



Participant Guide –
SAP310: Vendor Processing

State of Kansas



SAP310: Vendor Processing Participant Guide

Statewide Management, Accounting and Reporting Tool



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Course Overview

Course Objectives

Upon completion of the course, participants are able to:

- Explain the vendor business processes
- Describe how vendor processing integrates with other functions in SMART
- List the roles involved in vendor processing
- Search for an existing vendor in SMART
- Enter a new vendor, and enter new information for an existing vendor in SMART
- Request an update to a existing vendor information in SMART

Agenda

Today, we will cover the following topics:

- Vendor Processing in SMART – State of Kansas overview
- Search for an existing vendor in SMART
- Enter new vendor information in SMART
- Request updates or changes to existing vendor information in SMART

Lesson 1: Vendor Processing Overview

Objectives

Upon completion of this lesson, participants are able to:

- Define basic vendor processing terms and concepts
- List the SMART security access roles involved in the vendor process and describe the tasks that each role performs
- Explain the business process flow for vendor information within SMART
- Explain how vendor processing integrates with Accounts Payable and Purchasing modules in SMART

Topic 1: Vendor Processing Key Terms and Concepts

- **Vendor** – Any person or company from whom the State of Kansas purchases goods or services, including state agencies, sub-recipients, and sub-grantees.
In SMART, a Vendor profile is created to store and manage all the information relating to the vendor. Vendor records in SMART are STATEWIDE records, they are not Agency specific. This means that ALL Agencies have access to and can use vendor information.

Note. As a general rule, Agency employees are not included in the SMART vendor table for expense payment purposes. However, Regent employees are included in the SMART vendor table.

- **Vendor Name** – Legal or full name of the vendor. This information is sourced from the Form W-9 which is provided to the Agency by the vendor.
- **Taxpayer Identification Number (TIN)** - A tax processing number issued by the Internal Revenue Service (IRS) to a vendor. When entering a new vendor in SMART, the State of Kansas requires the vendor's taxpayer identification number (TIN), TIN type, withholding entity, and address sequence to be entered.
- **IRS - Form W-9** – Form W-9 is a form used by the Internal Revenue Service (IRS). Form W-9 requests the name, address, and taxpayer identification information of a taxpayer (usually in the form of a Social Security Number or Employer Identification Number. Either number is considered a Taxpayer Identification Number or TIN as it is commonly called).

Agencies are responsible for obtaining a **CURRENT** Form W-9 from a vendor prior to setting up a new vendor in SMART.

Note: Form W-9 is not sent to the IRS, it is maintained by each State Agency at their Agency office. If the Central Processing office needs to review a Form W-9 for a vendor, they will request that the Agency send them a copy of the form.

W-9
Form (Rev. October 2007)
Department of the Treasury
Internal Revenue Service

Request for Taxpayer Identification Number and Certification

Give form to the requester. Do not send to the IRS.

Name (as shown on your income tax return)

Business name, if different from above

Check appropriate box: Individual/Sole proprietor Corporation Partnership
 Limited liability company. Enter the tax classification (D-disregarded entity, C-corporation, P-partnership) Exempt payee
 Other (see instructions)

Address (number, street, and apt. or suite no.)

City, state, and ZIP code

List account number(s) here (optional)

Requester's name and address (optional)

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on Line 1 to avoid backup withholding. For individuals, this is your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the Part I instructions on page 3. For other entities, it is your employer identification number (EIN). If you do not have a number, see How to get a TIN on page 3.

Note. If the account is in more than one name, see the chart on page 4 for guidelines on whose number to enter.

Social security number

OR

Employer identification number

Part II Certification

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me), and
- I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding, and
- I am a U.S. citizen or other U.S. person (defined below).

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the Certification, but you must provide your correct TIN. See the instructions on page 4.

Sign Here Signature of U.S. person Date

Figure 1. IRS Form W-9

- State of Kansas - DA-130 Form** - Authorization for Electronic Deposit of Vendor Payment. Use this form to submit vendor bank account information to the Central processing office. To obtain a copy of the DA-130 Form please contact Accounts and Reports by phone: (785) 296-7917. The use of the DA-130 Form is covered later in this course.
- State of Kansas - DA-184 Form** - Authorization For Direct Deposit of Employee Pay and or Employee Travel .
 Regents - Use the DA-184 Form to submit Regent Employee Information to the Central processing office.
 Locate this form: <http://www.da.ks.gov/ar/pm/Forms/Default.htm>
 The use of the DA-184 Form is covered later in this course.
- State of Kansas - TM-21 Form**. Use the TM-21 Form to request changes to an existing vendor file in SMART.
 Submit the form to the Central processing office by emailing it to: <mailto:Arvendor@da.ks.gov>
 Locate this form: <http://www.da.ks.gov/ar/forms/default.htm>
 The use of the TM-21 Form is covered later in this course.

- **IRS - Form 1099**

Form 1099 is used by the Internal Revenue Service (IRS) and is used in the United States income tax system to prepare and file an information return to report various types of income other than wages, salaries, and tips.

Examples of reportable transactions are amounts paid to independent contractors.

If a Form 1099 is returned (due to address or TIN # discrepancies) to the State, the vendor file is closed in SMART by the Central Vendor Processor until a *CURRENT* Form W-9 is obtained from the vendor, and is then verified by the IRS.

Additional information about Form 1099 and reporting requirements is covered later in this course.

- **ACH - Automated Clearing House (ACH).** Automated Clearing House (ACH) is an electronic network for financial transactions in the United States. ACH processes large volumes of credit and debit transactions in batches. ACH credit transfers include direct deposit payroll and vendor payments.

In the State of Kansas, an ACH payment is a payment made by the State of Kansas directly into a vendor's bank account. No live system check is generated when using the ACH payment type. The use of ACH payments is covered later in this course.

Topic 2: Vendor Security Access Roles in SMART

Role	Description
Agency Vendor Processor	This role is responsible for entering and saving new vendor information in SMART. This role cannot edit or modify existing vendor information in SMART.
Central Vendor Processor	This role is responsible for approving new vendors and maintaining all vendor information in SMART. This role, which is performed centrally, is the only role that has access to modifying existing vendor information in SMART.

Topic 3: Vendor Business Process Flows in SMART

- When an agency is preparing to enter vendor information into SMART, they need to gather all required information that needs to be entered prior to using SMART:
 - Basic business information for the vendor
 - Mailing address
 - Location information
 - Procurement defaults
 - Payment options and information
 - Vendor's TIN Number

- Vendor records are created for *Statewide* use, they are not Agency specific records. This allows all State Agencies to access and use all vendor records in SMART.

- There is no formal systematic workflow or approval process associated with the Vendor module in SMART. Therefore Agencies may add and save vendor information, but they cannot edit or modify existing vendor information in SMART. All edits and changes must be completed by the Central Processing Office.

- The following graphic highlights the business process for an Agency to enter vendor information in SMART:

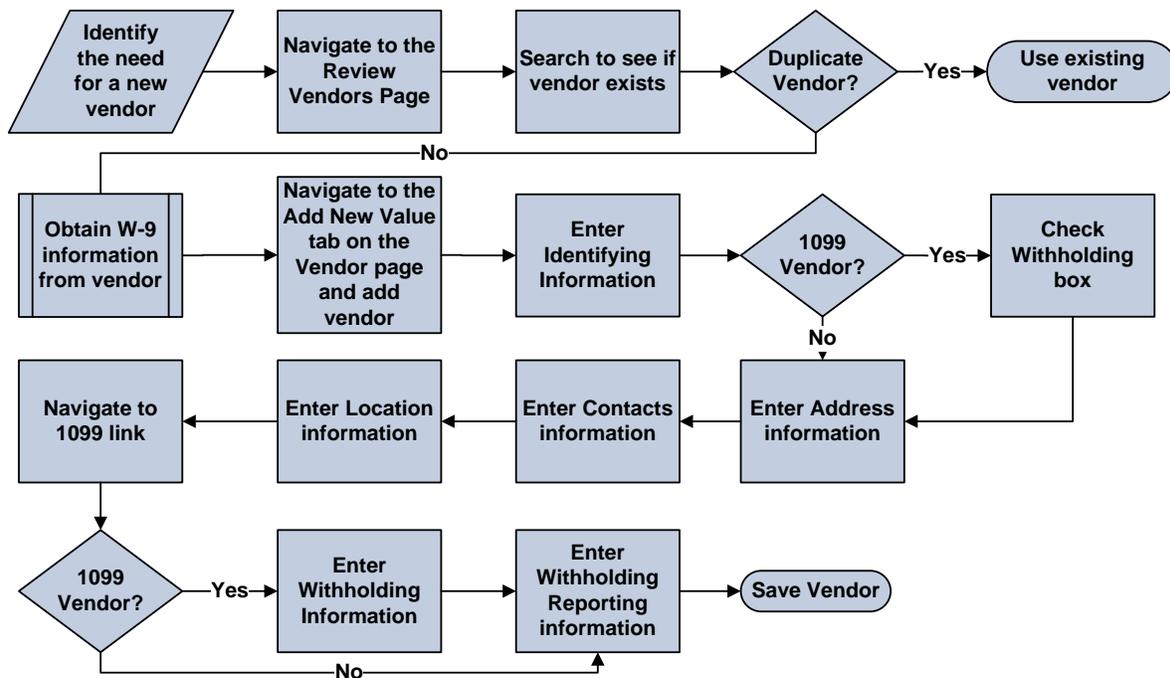


Figure 2. Business Process to Enter Vendor Information in SMART

SAP310 – SMART Vendor Processing

- A vendor record is not available for use, and is visible to an Agency with an “Unapproved” status until it has been approved by the Central Processing office. It is important to understand that SMART **does not send email notifications** to Agencies once a vendor has been “Approved”. Once the vendor is “Approved” by the Central Processing office, the vendor record then becomes available for use by ALL Agencies within SMART.
- The following graphic highlights the processing of vendor information in SMART:

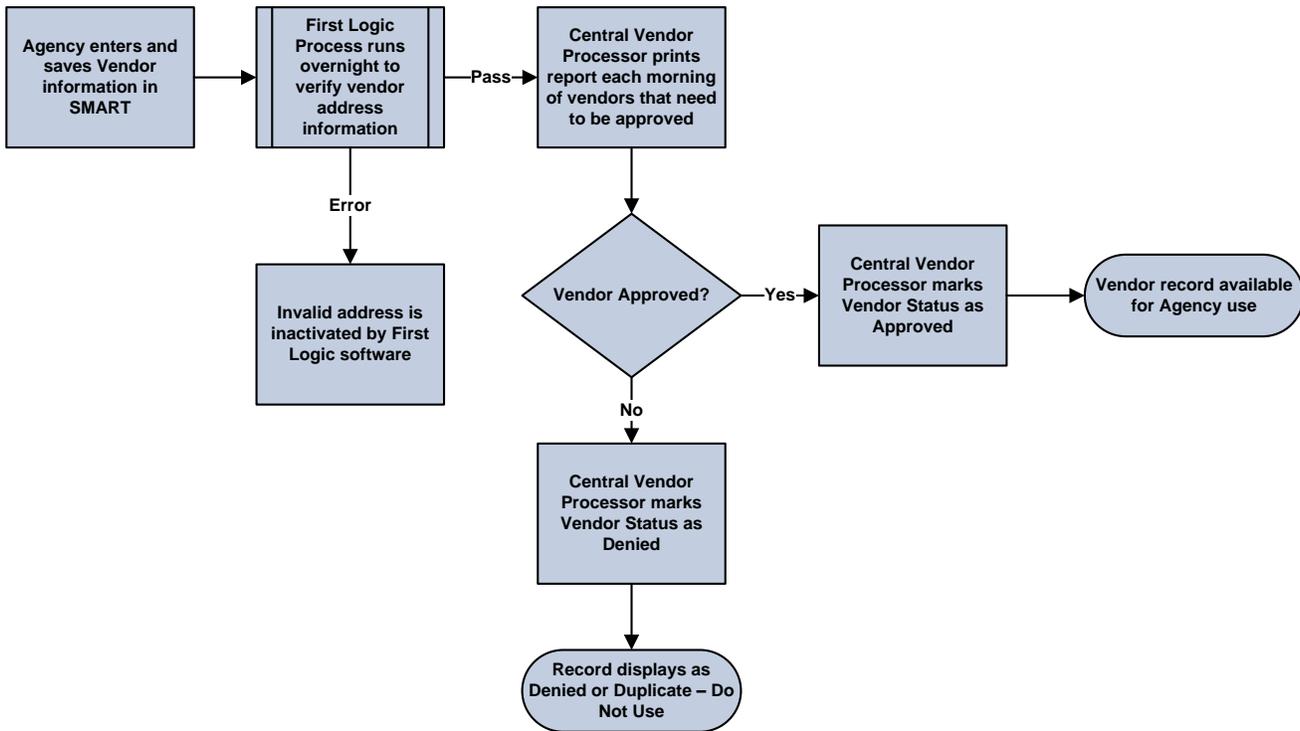


Figure 3. Vendor Processing in SMART

Topic 4: Integration between Vendors, Accounts Payable, and Purchasing modules

- The Accounts Payable and the Purchasing modules in SMART share the vendor file information which is stored in the Vendor module in SMART
- Vendor information must be added by an Agency and **approved by Central** in SMART **before** it can be used on a transaction in the Purchasing or Accounts Payables modules within SMART
- Vendor data is defaulted directly into purchase orders, vouchers, and payments which reference the vendor (using the 10 digit Vendor ID number assigned to the vendor by SMART – not the vendor TIN number)

Lesson Review

In this lesson, you learned how to:

- Define SMART basic vendor processing terms and concepts
- Identify SMART security roles and tasks associated with Vendor entry in SMART
- Describe the business process for SMART vendor information processing
- Explain the integration of vendor information with the Accounts Payable and Purchasing modules in SMART

Lesson 2: How to Use Existing Vendor Information in SMART

Objectives

Upon completion of this lesson, you will be able to:

- Describe the importance of verifying if vendor information exists in SMART prior to adding new vendor information
- Request an update or modification to existing vendor information in SMART
- Request the inactivation of existing vendor information in SMART
- Search for a vendor that has previously been entered into SMART
- Review existing SMART vendor information

Topic 1: Verify Existing Vendor Information in SMART

- **Important! Prevent Duplicate Vendor Entries in SMART!**

A common issue with vendors in SMART is the duplication of existing vendor information being entered into SMART by Agency Vendor Processors.

The State of Kansas expects all Agency Vendor Processors to verify that the vendor information does NOT already exist in SMART PRIOR TO entering any new or additional vendor information into SMART. This process involves a manual review of ALL existing vendor information in SMART before adding any new vendor information.

It is important to understand that Agency staff are NOT able to edit existing vendor information in SMART, they may only add **new** vendor information in SMART. ***Edits to existing vendor information are performed by the Central Agency Vendor Processor and must be submitted using a TM-21 Form.***

Important! Prevent Duplicate Vendor Address Entries in SMART!

If an existing address in SMART is incorrect, please do NOT add a new address to correct the existing address in the vendor file. Please submit a TM-21 form to have the Central Vendor Processor edit the EXISTING address we have on file for the vendor. This prevents duplication of efforts and data in SMART. Thank you.

SMART users with the Agency Vendor Processor role or the Vendor Viewer role are able to select the “View All” link to view a history of all vendor addresses or locations. It is important to understand that SMART will allow only one address for each specific effective date.

Topic 2: Edit or Inactivate Existing Vendor Information in SMART

Use the **TM-21 Form** to request changes to, or in-activations of, existing vendor information in SMART. Click this link to access the TM-21 Form: <http://www.da.ks.gov/ar/forms/default.htm>. Submit the completed TM-21 form to the Central processing office by emailing it directly to: <mailto:Arvendor@da.ks.gov>.

The Central Agency Processor reviews the changes and either completes or denies them. Please understand that there is NO formal workflow process in the Vendors module in SMART. This means that **you will NOT receive an email notification advising you that the vendor changes have been completed or denied as requested**. You will need to check the vendor files in SMART to determine if, and when, the changes you submitted have been processed. For vendor inactivation requests, the Central Agency Processor changes the Status of inactivated vendors from “Active” to “Denied” in SMART.

Topic 3: Search for Existing Vendor Record in SMART

Use the **Review Vendors** page to locate existing vendor information in SMART prior to entering new vendor information into SMART. Enter the desired **Search Criteria** and click the **Search button** to display the search results grid at the bottom of the Review Vendors page.

Note: Use the SEARCH button, hitting the enter key does not work on this page!

Page name	Navigation
Review Vendors	Vendors>Vendor Information>Add/Update>Review Vendors

Review Vendors

Search Criteria

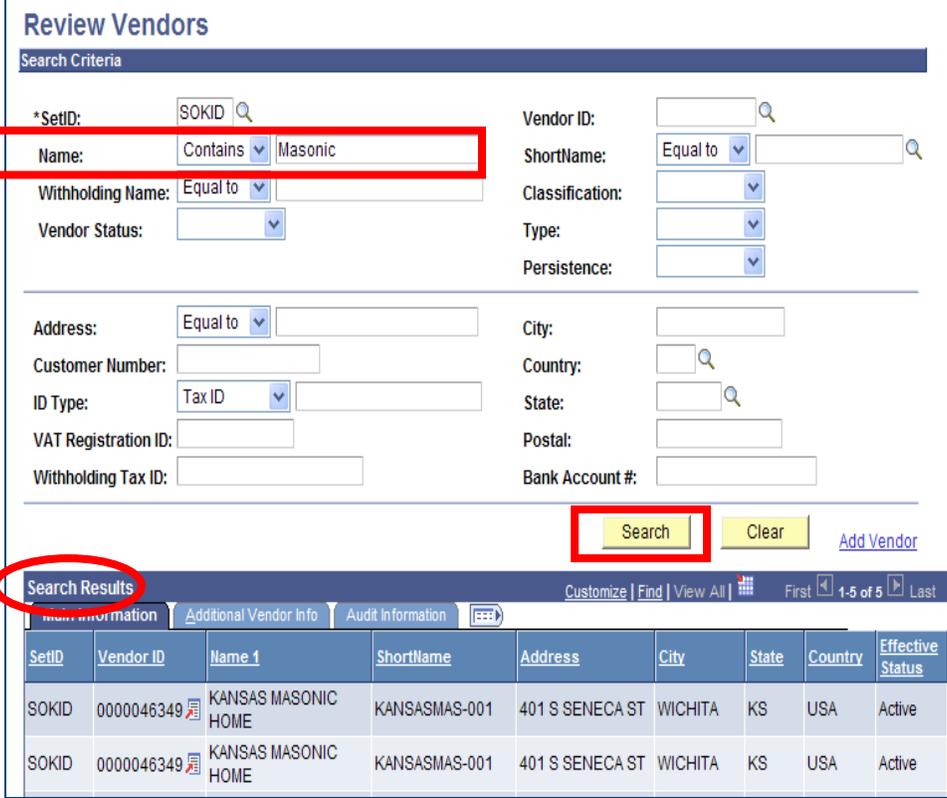
<p>*SetID: <input type="text" value="10KID"/> <input type="button" value="Q"/></p> <p>Name: <input type="text" value="Equal to"/> <input type="text"/></p> <p>Withholding Name: <input type="text" value="Equal to"/> <input type="text"/></p> <p>Vendor Status: <input type="text"/></p>	<p>Vendor ID: <input type="text"/> <input type="button" value="Q"/></p> <p>ShortName: <input type="text" value="Equal to"/> <input type="text"/> <input type="button" value="Q"/></p> <p>Classification: <input type="text"/></p> <p>Type: <input type="text"/></p> <p>Persistence: <input type="text"/></p>
<p>Address: <input type="text" value="Equal to"/> <input type="text"/></p> <p>Customer Number: <input type="text"/></p> <p>ID Type: <input type="text" value="Tax ID"/> <input type="text"/></p> <p>VAT Registration ID: <input type="text"/></p> <p>Withholding Tax ID: <input type="text"/></p>	<p>City: <input type="text"/></p> <p>Country: <input type="text"/> <input type="button" value="Q"/></p> <p>State: <input type="text"/> <input type="button" value="Q"/></p> <p>Postal: <input type="text"/></p> <p>Bank Account #: <input type="text"/></p>

[Add Vendor](#)

Figure 2.1. Review Vendors Page

Search for Vendor by Name

- Select “Contains” in the dropdown box for **Name**
- Type in part of the Vendor Name
- Click on the “**Search**” button
- Review the **Search Results** at the bottom of the page
- Locate the desired result and click the  icon



Review Vendors

Search Criteria

*SetID: SOKID

Name: Contains Masonic

Withholding Name: Equal to

Vendor Status:

Vendor ID:

ShortName: Equal to

Classification:

Type:

Persistence:

Address: Equal to

City:

Customer Number:

Country:

ID Type: Tax ID

State:

VAT Registration ID:

Postal:

Withholding Tax ID:

Bank Account #:

Search Clear Add Vendor

Search Results

SetID	Vendor ID	Name 1	ShortName	Address	City	State	Country	Effective Status
SOKID	0000046349	KANSAS MASONIC HOME	KANSASMAS-001	401 S SENECA ST	WICHITA	KS	USA	Active
SOKID	0000046349	KANSAS MASONIC HOME	KANSASMAS-001	401 S SENECA ST	WICHITA	KS	USA	Active

Figure 2.2. Review Vendors Page – Search by Name

Search for Vendor by Address

- Select “Contains” in the **Address** dropdown box
- Type in part of the address
- Click the “**Search**” button
- Review the **Search Results** at the bottom of the page
- Locate the desired result and click the  icon

Review Vendors

Search Criteria

*SetID: SOKID  Vendor ID: 

Name: Equal to ShortName: Equal to 

Withholding Name: Equal to Classification:

Vendor Status: Type:

Persistence:

Address: Contains City:

Customer Number: Country: 

ID Type: Tax ID State: 

VAT Registration ID: Postal:

Withholding Tax ID: Bank Account #:

[Add Vendor](#)

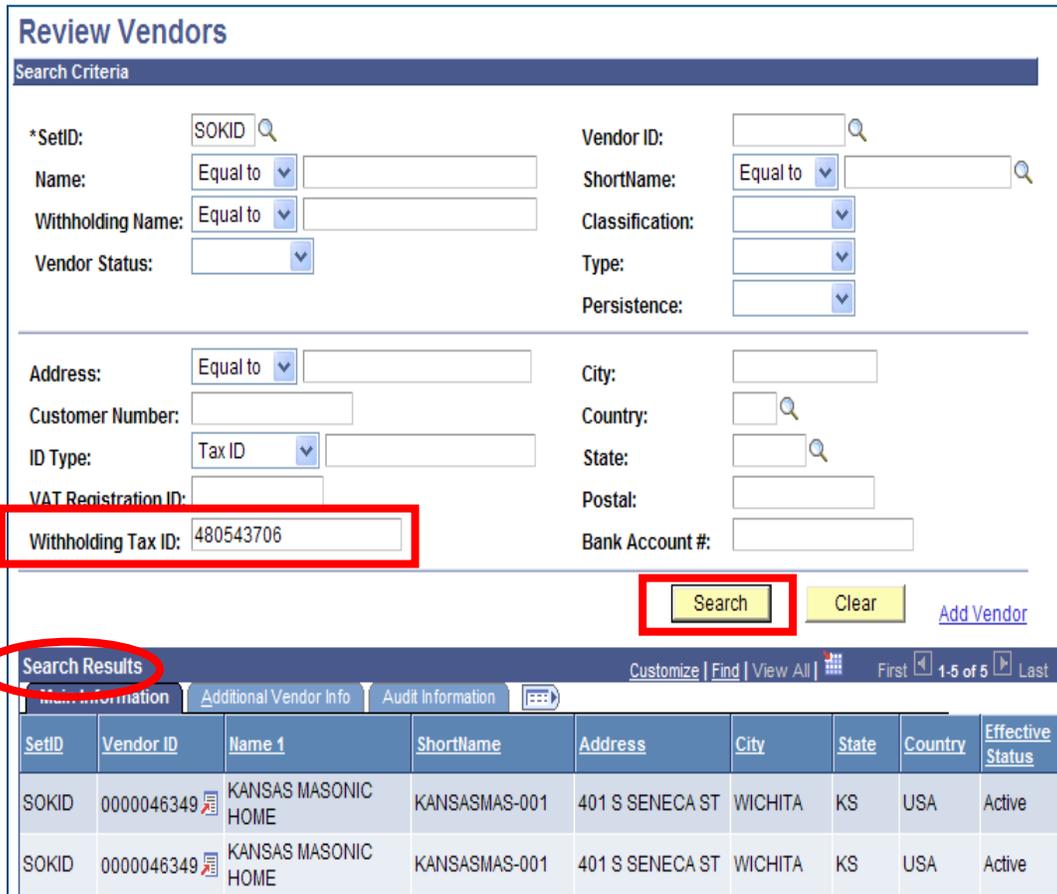
Search Results Customize | Find | View All | First 1-5 of 5 Last

SetID	Vendor ID	Name 1	ShortName	Address	City	State	Country	Effective Status
SOKID	0000046349 	KANSAS MASONIC HOME	KANSASMAS-001	401 S SENECA ST	WICHITA	KS	USA	Active
SOKID	0000046349 	KANSAS MASONIC HOME	KANSASMAS-001	401 S SENECA ST	WICHITA	KS	USA	Active

Figure 2.3. Review Vendors Page – Search by Address

Search for Vendor by Withholding Tax ID Number

- Enter the Withholding Tax ID number in the **Withholding Tax ID** field
- Click the “**Search**” button
- Review the **Search Results** at the bottom of the page
- Locate the desired result and click the  icon

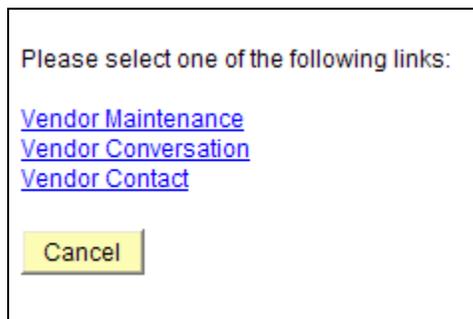


The screenshot shows the 'Review Vendors' interface. In the 'Search Criteria' section, the 'Withholding Tax ID' field is highlighted with a red box and contains the value '480543706'. The 'Search' button is also highlighted with a red box. Below the search criteria, the 'Search Results' section is circled in red. It displays a table with two identical entries for 'KANSAS MASONIC HOME'.

SetID	Vendor ID	Name 1	ShortName	Address	City	State	Country	Effective Status
SOKID	0000046349	KANSAS MASONIC HOME	KANSASMAS-001	401 S SENECA ST	WICHITA	KS	USA	Active
SOKID	0000046349	KANSAS MASONIC HOME	KANSASMAS-001	401 S SENECA ST	WICHITA	KS	USA	Active

Figure 2.4. Review Vendors Page – Search by Withholding Tax ID

Clicking the  (**View Related Links**) icon opens this screen:



The dialog box contains the text 'Please select one of the following links:' followed by three blue hyperlinks: 'Vendor Maintenance', 'Vendor Conversation', and 'Vendor Contact'. A yellow 'Cancel' button is located at the bottom.

Figure 2.5. Existing Vendor link options

Select the **Vendor Maintenance** link to open the vendor record in a new window.

Topic 4: Review Existing Vendor Record in SMART

Use the vendor information pages to review existing information for a vendor in SMART. This topic provides a general overview of each of the pages used to store vendor information in SMART. The creation of a new vendor and the entry of data into these fields will be covered later in this course.

Summary Page

The **Summary** page contains an overview of the key information for a vendor in SMART.

Page name	Navigation
Summary	Vendors > Vendor Information > Add/Update > Review Vendors > (Enter Search Criteria) > Search Results > Click the  (View Related Links) icon > Click the Vendor Maintenance link > Click the Summary Tab page



Figure 2.6. Vendor Summary Page

Identifying Information Page

The **Identifying Information** page lists additional vendor information including the Vendor Name, the Vendor Short Name, Vendor ID number, Vendor Status, and Withholding checkbox.

Page name	Navigation
Identifying Information	Vendors > Vendor Information > Add/Update > Review Vendors > (Enter Search Criteria) > Search Results > Click the  (View Related Links) icon > Click the Vendor Maintenance link > Click the Identifying Information Tab

Summary Identifying Information Address Contacts Location Custom

SetID: SOKID Check for Duplicate

Vendor ID: 0000046349

*Vendor Short Name: KANSAS MAS KANSASMAS-001

*Vendor Name 1: KANSAS MASONIC HOME

Vendor Name 2:

*Status: Approved *Classification: Supplier

*Persistence: Regular HCM Class:

VAT Registration [Registration](#) [VAT Default](#) [VAT Service Treatment Setup](#)

Withholding Expand All Collapse All

Open For Ordering

Figure 2.7. Vendor Identifying Information Page (Detail)

If you select a vendor that shows “Duplicate Vendor” in the Vendor Name 1 field, use only the vendor number given to find the new vendor record. **DO NOT** include the asterisk and number following it when using the vendor number.

Summary Identifying Information Address Contacts Location Custom

SetID: SOKID Check for Duplicate

Vendor ID: 0000226111

*Vendor Short Name: NEW ENGLAN NEW ENGLAN-010

*Vendor Name 1: DUPLICATE VENDOR (USE 231)*2

Vendor Name 2: NEW ENGLAND LIFE INSURANCE COMPANY

*Status: Denied *Classification: Supplier

*Persistence: Regular HCM Class:

VAT Registration [Registration](#) [VAT Default](#) [VAT Service Treatment Setup](#)

Withholding Expand All Collapse All

Open For Ordering

Figure 2.8. Example of a Duplicate Vendor Record (Detail)

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Address Page

The **Address** page lists all address information for a vendor in SMART. Use the **View All** link to view all addresses for the vendor. The **Phone Information** section contains payment location information for the vendor.

Page name	Navigation
Address	Vendors > Vendor Information > Add/Update > Review Vendors > (Enter Search Criteria) > Search Results > Click the  (View Related Links) icon > Click the Vendor Maintenance link > Click the Address Tab > Click the View All link

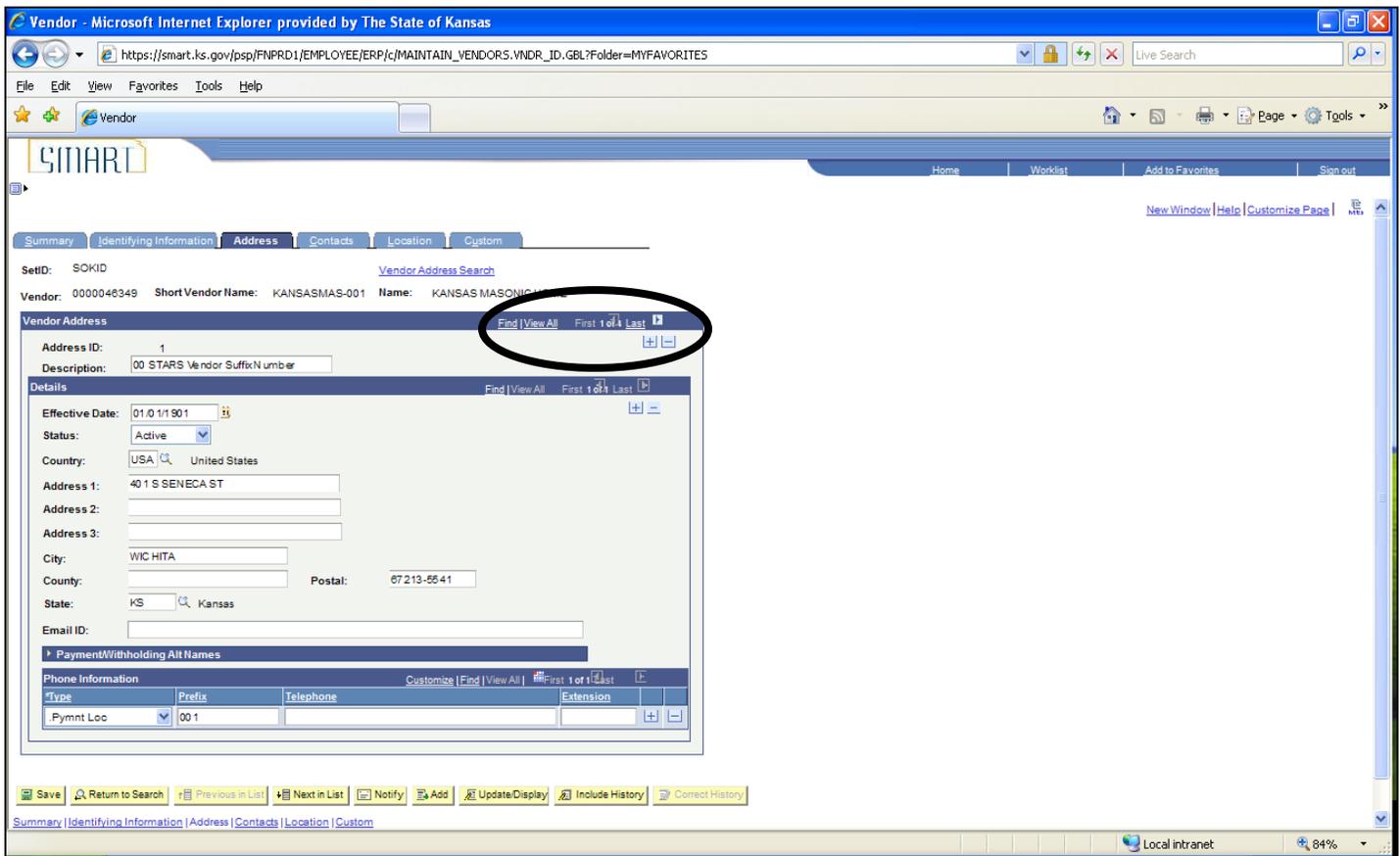


Figure 2.9. Vendor Addresses Page

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Summary | Identifying Information | **Address** | Contacts | Location | Custom

SetID: SOKID
Vendor: 0000308724 Short Vendor Name: CASEYS GEN-003 Name: JONES V CASEYS GENERAL STORE INC

Vendor Address Find | View All First 1 of 1 Last

Address ID: 1
Description: MAIN

Details Find | View All First 1 of 1 Last

Effective Date: 01/01/1901
Status: Active
Country: USA United States
Address 1: 3301 KERNER BLVD
Address 2:
Address 3:
City: SAN RAFAEL
County:
Postal: 94901-4856
State: CA California
Email ID:

Payment/Withholding Alt Names

Payment Alternate name

Name 1:
Name 2:

Withholding Alternate name

Withholding Name 1:
Withholding Name 2:

Phone Information Customize | Find | View All First 1 of 1 Last

*Type	Prefix	Telephone	Extension
.Pymnt Loc	001		

Save | Return to Search | Previous in List | Next in List | Notify | Add | Update/Display | Include History | Correct History

[Summary](#) | [Identifying Information](#) | [Address](#) | [Contacts](#) | [Location](#) | [Custom](#)

Figure 2.10. Vendor Addresses Page (Detail)

Contacts Page

The **Contacts** page stores the contact information for the contacts at the vendor.

Page name	Navigation
Contacts	Vendors > Vendor Information > Add/Update > Review Vendors > (Enter Search Criteria) > Search Results > Click the  (View Related Links) icon > Click the Vendor Maintenance link > Click the Contacts Tab > Click the View All link

SetID: SOKID

Vendor: 0000046349 Short Vendor Name: KANSASMAS-001 Name: KANSAS MASONIC HOME

Vendor Contact Find | View All First 1 of 1 Last 

Contact ID: 1
Description: MAIN

Details Find | View All First 1 of 1 Last 

Eff Date: 09/24/2011 
 Status: Active 
 Type: 
 Name:
 Title:
 Address: 

Internet: http:// [View Internet Address](#)
 Email ID:

Phone Information Customize | Find | View All  First 1 of 1 Last 

*Type	Prefix	Telephone	Extension
	<input type="text"/>	<input type="text"/>	<input type="text"/> 

Figure 2.11. Contacts Page

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Location Page

The **Location** page contains the vendor payment information, vendor bank account information, Withholding information, and business procurement card information for the vendor.

Page name	Navigation
Location	Vendors > Vendor Information > Add/Update > Review Vendors > (Enter Search Criteria) > Search Results > Click the  (View Related Links) icon > Click the Vendor Maintenance link > Click the Location Tab > Click the View All link

Summary
Identifying Information
Address
Contacts
Location
Custom

SetID: SOKID

Vendor: 0000046349 Short Vendor Name: KANSASMAS-001 Name: KANSAS MASONIC HOME

A vendor location is a default set of rules which define how you conduct business with a vendor.

Location
Find | View All
First ◀ 1 of 2 ▶ Last

*Location: Default

Description: [RTV Fees](#)

Details
Find | View All
First ◀ 1 of 1 ▶ Last

*Effective Date:

Status: ▼

Options: [Payables](#) [Procurement](#) [Sales/Use Tax](#) [1099](#) Expand All Collapse All

▶ Additional ID Numbers

▶ Comments

▶ Internet Address

▶ VAT

Expand All Collapse All

Figure 2.12. Vendor Location Page

SAP310 – SMART Vendor Processing

Summary Identifying Information Address Contacts **Location** Custom

SetID: SOKID
Vendor: 0000046349 Short Vendor Name: KANSASMAS-001 Name: KANSAS MASONIC HOME

A vendor location is a default set of rules which define how you conduct business with a vendor.

Location Find View All First 1 of 2 Last

*Location: 001 Default

Description: SYSTEM CHECK [RTV Fees](#)

Details Find View All First 1 of 1 Last

*Effective Date: 01/01/2010

Status: Active

Options: [Payables](#) [Procurement](#) [Sales/Use Tax](#) [1099](#) [Expand All](#) [Collapse All](#)

▶ Additional ID Numbers

▶ Comments

▶ Internet Address

▶ VAT

[Expand All](#) [Collapse All](#)

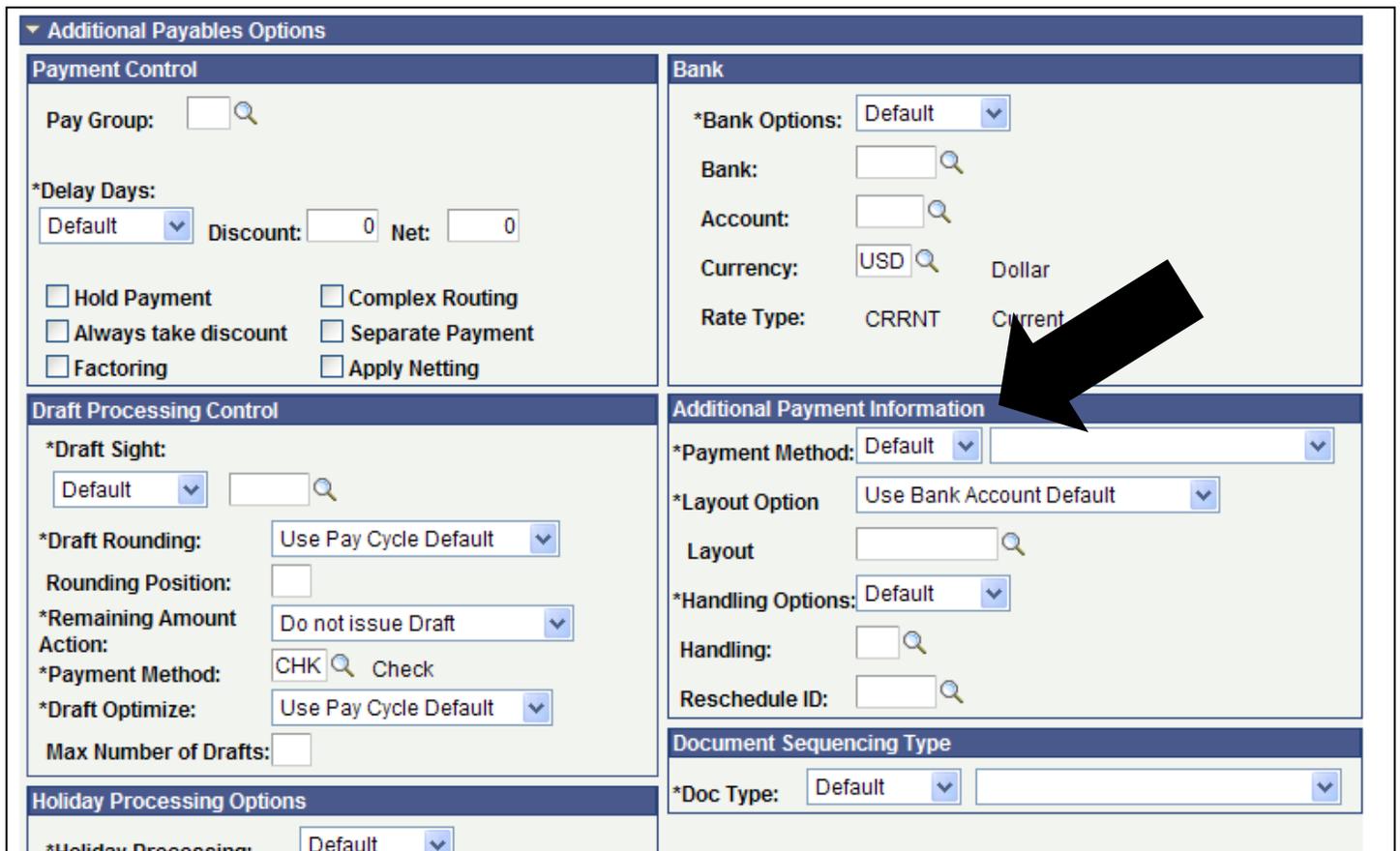
[Save](#) [Return to Search](#) [Notify](#) [Add](#) [Update/Display](#) [Include History](#) [Correct History](#)

Figure 2.13. Vendor Location Page (Detail)

Location Page - Payables Link

Clicking the Payables link on the Location page opens the **Payables Options** page. The Payables Options page contains the **Additional Payment Information** and the **Vendor Bank Account Options**.

Page name	Navigation
Payables Options	Vendors > Vendor Information > Add/Update > Review Vendors > (Enter Search Criteria) > Search Results > Click the  (View Related Links) icon > Click the Vendor Maintenance link > Click the Location Tab > Click the Payables Link



The screenshot displays the 'Additional Payables Options' page with several configuration sections:

- Payment Control:** Includes fields for Pay Group, Delay Days (Default, Discount, Net), and checkboxes for Hold Payment, Always take discount, Factoring, Complex Routing, Separate Payment, and Apply Netting.
- Bank:** Includes dropdowns for Bank Options (Default), Bank, Account, Currency (USD, Dollar), and Rate Type (CRRNT, Current).
- Draft Processing Control:** Includes dropdowns for Draft Sight (Default), Draft Rounding (Use Pay Cycle Default), Rounding Position, Remaining Amount Action (Do not issue Draft), Payment Method (CHK, Check), Draft Optimize (Use Pay Cycle Default), and Max Number of Drafts.
- Additional Payment Information:** Includes dropdowns for Payment Method (Default), Layout Option (Use Bank Account Default), Handling Options (Default), and Reschedule ID. A black arrow points to this section.
- Document Sequencing Type:** Includes a dropdown for Doc Type (Default).
- Holiday Processing Options:** Includes a dropdown for Holiday Processing (Default).

Figure 2.14. Payables Options Page – top of page

SAP310 – SMART Vendor Processing

▶ Matching/Approval Options

▶ Electronic File Options

▶ Self-Billed Invoice Options

▼ Vendor Bank Account Options

Vendor Bank Accounts Find | View All First 1 of 1 Last

Default Descr:

Country: Search

Bank Name:

Branch Name:

Bank ID Qualifier:

Bank Identifier Code

Bank ID:

Bank Account Number:

DFI Qualifier:

IBAN:

Branch ID:

Check Digit:

DFI ID:

Account Type:

▶ Vendor Type Options

▶ HIPAA Information

▶ Debit Memo Options

Figure 2.15. Payables Options Page – Vendor Bank Account Options

Note: Vendor Bank Account Options > **Account Type** field > Drop down list options:

Use only the options of either “**Check Acct**” or “**Time Dep**”. Use Time Dep to indicate a savings account.

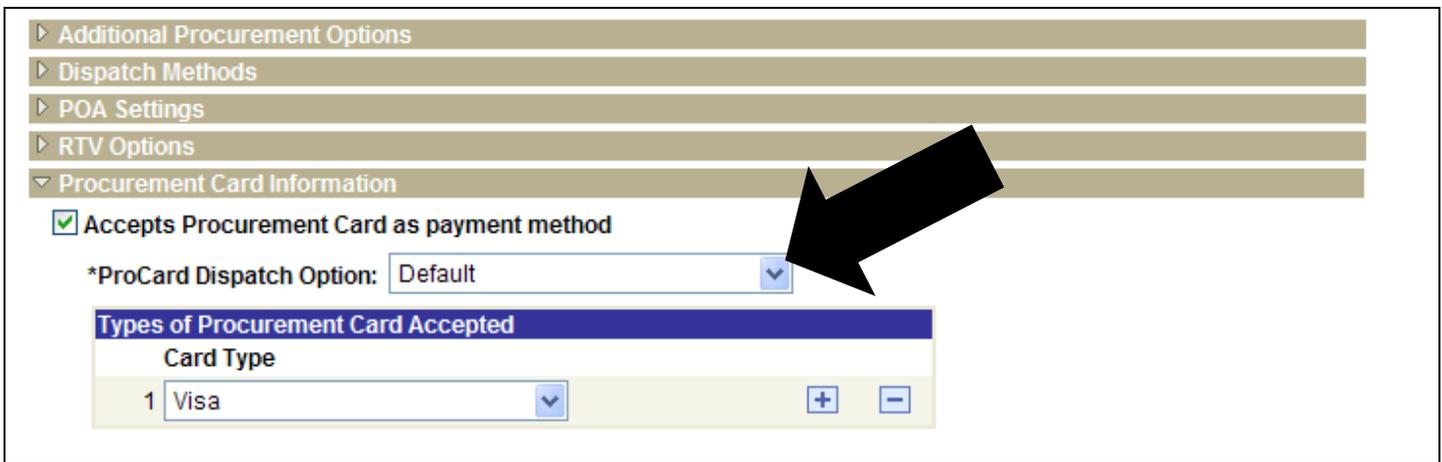
Do NOT use the option of ‘Savings’, or any other options from this drop down list. Thank you.

Location Page - Procurement Link

Clicking the Procurement link on the Location page opens the **Procurement Options** page which contains the Procurement Card Information for the vendor. If a vendor accepts business procurement cards as a method of payment, the **Accepts Procurement Card as payment method** checkbox is selected.

Agencies change the default ***ProCard Dispatch Option** from Default to **Contact Cardholder**.

Page name	Navigation
Procurement Options	Vendors > Vendor Information > Add/Update > Review Vendors > (Enter Search Criteria) > Search Results > Click the  (View Related Links) icon > Click the Vendor Maintenance link > Click the Location Tab > Click the Procurement Link



The screenshot shows the Procurement Options page with the following elements:

- Additional Procurement Options
- Dispatch Methods
- POA Settings
- RTV Options
- Procurement Card Information
 - Accepts Procurement Card as payment method
 - *ProCard Dispatch Option: Default (dropdown menu)
 - Types of Procurement Card Accepted

Card Type
1 Visa

Figure 2.15. Procurement Options Page (Detail)

Location Page – Sales/Use Tax Link

The State of Kansas is not using the Sales/Use Tax Link.

Location Page - 1099 Link

Click the **1099** link on the Location page to open the **Withholding Vendor Information** page. The Withholding Vendor Information page is used to store the 1099 Withholding and/or Reporting information for a vendor.

Withholding information is covered in depth in Lesson 3 of this training course.

Page name	Navigation
Withholding Vendor Information	Vendors > Vendor Information > Add/Update > Review Vendors > (Enter Search Criteria) > Search Results > Click the  (View Related Links) icon > Click the Vendor Maintenance link > Click the Location Tab > Click the 1099 Link

- **Withholding Vendor Information**

- o Both sections, 1099 Information and 1099 Reporting Information, must be completed

Withholding Vendor Information

SetID: SOKID Location: 001
 Vendor ID: 0000046349 Description: System Check
 Short Vendor Name:
 Name 1: KANSAS MASONIC HOME

1099 Options

1099 Information Customize | Find | View All | First 1 of 1 Last

*Entity	*Type	*Jurisdiction	Default Jurisdiction	*Default Class	*1099 Status	
IRS	1099	FED	<input checked="" type="checkbox"/>	06	RPT	Reporting Only

1099 Reporting Information Customize | Find | View All | First 1 of 1 Last

*Entity	*Address	TIN Type	Taxpayer Identification Number	Gender	Date of Birth	Birth Location	Number of children	Company
IRS	1	F	480543706					

Figure 2.16. Withholding Vendor Information

Lesson 3: Enter New Vendor Information into SMART

Objectives

Upon completion of this lesson, you will be able to:

- Define the key terms and concepts used in the entry of vendor information in SMART
- Navigate to and use the vendor pages in SMART to enter vendor information

Topic 1: Vendor Information - Statewide Standards in SMART

- Vendor information is entered using ALL CAPS in SMART
- A vendor must be in an *Approved* status before you are able to use that vendor on a purchase requisition, purchase order, voucher, or payment in SMART.
- Do NOT edit Statewide Contract Vendors. Contact the Department of Administration, Central Processing office PRIOR to editing an EXISTING STATEWIDE Contract vendor. Eg: Staples

Topic 2: Summary Page

The Summary Page is a view only page that contains an overview of the key information for a vendor. The following topics will teach you how to enter the data into the remaining vendor pages.

Page name	Navigation
Summary	Vendors > Vendor Information > Add/Update > Find An Existing Value > Enter Search Criteria > Click the Search button > Summary Tab

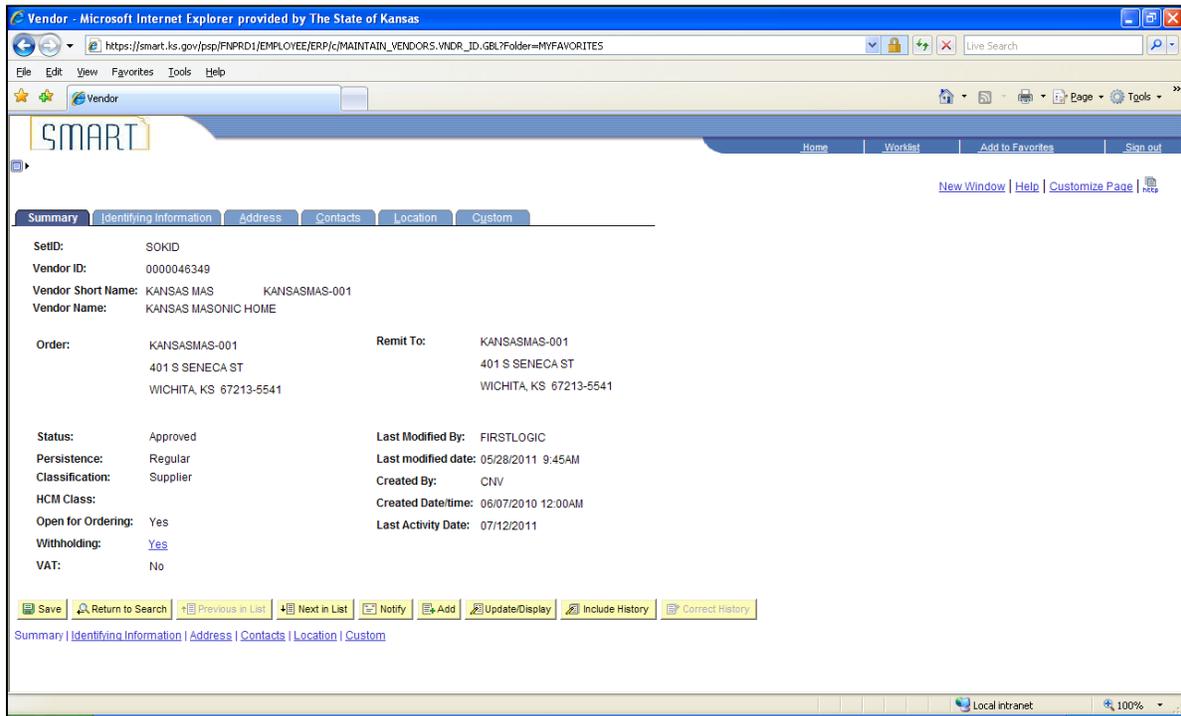


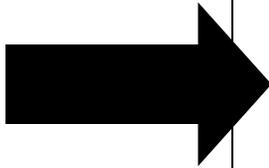
Figure 3.1. Summary Page

SAP310 – SMART Vendor Processing

Fields	Description
SetID	SOKID = State of Kansas ID. All vendor records in SMART are Statewide vendors, not Agency specific vendors.
Vendor ID	Contains the 10 digit Vendor ID number assigned to the vendor in SMART. Each vendor is assigned a unique 10 digit vendor ID number in SMART.
Vendor Short Name	Each vendor is assigned a 10 character Vendor Short Name in SMART.
Vendor Name	Contains the legal or full name of the vendor which is sourced from the Form W-9 or the Form W-8 when the vendor is originally set up in SMART.
Order	Contains the vendor's Address information. This information is sourced from the vendor Address page in SMART.
Remit To	Contains the vendor's Location information. This information is sourced from the vendor Location page in SMART.

Fields	Description
Status	<p>Displays the current status of the vendor according to the SMART vendor statuses. The Statuses available include Approved, Denied, Inactive, To Archive, and Unapproved.</p> <p>SMART Vendor Status Definitions:</p> <ul style="list-style-type: none"> • Approved – For Central Vendor Processors, SMART automatically assigns a status of <i>Approved</i> to the vendor when entering a new vendor. SMART does not recognize a vendor as being in an <i>Approved</i> Status unless an authorized Accounts Payable or Purchasing user enters or approves it. <i>A vendor must be in an Approved status before vouchers, purchase requisitions, or purchase order transactions, can be created for the vendor in SMART.</i> • Denied - Central Vendor Processors may change the vendor Status to <i>Denied</i>. Once a vendor has been assigned a <i>Denied</i> Status, SMART users are unable to enter any transactions for the vendor in SMART. Duplicate vendors in SMART will be changed to a <i>Denied</i> Status. • Inactive – Central Vendor Processors may inactivate a vendor. Once a vendor has been assigned an <i>Inactive</i> Status, SMART users are unable to enter any transactions for the vendor in SMART. • To Archive – A Central Vendor Processor may select the <i>To Archive</i> Status. Once the <i>To Archive</i> Status has been selected, SMART users cannot enter any new transactions for this vendor; and the vendor is purged from SMART. • Unapproved – Only a user with a Central Vendor Processor role may <i>Unapprove</i> a vendor. Once a vendor has been assigned an <i>Unapproved</i> Status in SMART, users cannot use that vendor for any transactions in SMART. <i>A new vendor created by an Agency and saved in SMART is saved with an Unapproved status, and is unavailable for use until the vendor record has been reviewed and Approved by a Central Vendor Processor.</i>
Persistence	<p>Denotes the frequency of transactions the vendor has with the State of Kansas.</p> <p>SMART Vendor Persistence Definition:</p> <p>Regular –You can create an unlimited number of vouchers for this vendor.</p> <p>Agencies: Use only the REGULAR persistence. Do not use any other Persistence options.</p>

Fields	Description
<p>Classification</p>	<p>The field that denotes the SMART Classification of a vendor, including Attorney, Employee, Medical, or Supplier.</p> <p>Note: Most State vendors are <i>Suppliers</i>. Regent employees are the only Agency employees entered into SMART as vendors. Regent employees are entered with the Classification of “<i>Supplier</i>”, NOT “<i>Employee</i>”.</p> <p>Regents do NOT have to complete a Form W-9 for a new individual employee, however, the Regent must supply a DA-184 form or a DA-130 form for the new employee to the Central Vendor Processing office.</p> <p>HCM (Human Capital Management): Note to Agencies:</p> <p>For existing vendors in SMART with the HCM Classification: Agencies may use the existing vendor record as it is in SMART. The agency MUST NOT make any changes to the existing vendor record.</p> <p>It is important to know that if you are using an existing vendor in SMART which has an HCM classification, and you are sending the vendor a payment check; if the check gets returned for any reason, the check may not be returned to your agency as you might expect. The check may be returned to the Department of Administration, Payroll Services staff instead of your agency.</p> <p>Question: I need to make a change to a vendor with an HCM Classification. How do I do this?</p> <p>Answer: Changes are MUST NOT be made to existing vendors with an HCM Classification in SMART. Your Agency must either use a different existing vendor record in SMART, or ADD A NEW vendor record in SMART (please check that the vendor record does not already exist before adding a new vendor record – thank you!)</p>
<p>HCM Class (Human Capital Management)</p>	<p>Agencies: The HCM option is not for Agency use. It is to be used only by Department of Administration, Payroll Services staff.</p>
<p>Open for Ordering</p>	<p>When selected, this checkbox indicates that purchase requisitions and purchase orders (POs) may be created for this vendor in SMART Purchasing.</p>



SAP310 – SMART Vendor Processing

Fields	Description
Withholding	The Withholding Field indicates whether a vendor is considered to be eligible for 1099 withholding, or not. Information about 1099 withholding for vendors is covered later in this course.
VAT	The State of Kansas is not using the VAT option in SMART.
Last Modified By	This field contains the name of the user or process that last modified the vendor record in SMART (most recently).
Last modified date	This field contains the date and time that the vendor record was last modified in SMART (most recently).
Created By	This field contains the name of the SMART user that originally created the vendor record in SMART. Note: The value CNV indicates that the vendor record was migrated from the State of Kansas' prior operating system (STARS) into SMART.
Created Date/time	This field contains the date and time that the vendor record was originally created in SMART
Last Activity Date	This field contains the date and time that the vendor record was last changed or processed in SMART. The Last Activity Date includes both manual changes and automated batch processes that occur on a vendor record.
Save button	The Save button is used to Save any changes that you have made to a vendor record in SMART. If you do not use the Save button, you may lose any changes that you have made to the vendor record.
Return to Search button	Clicking the Return to Search button returns you to the previous vendor search criteria or vendor search results page in SMART.
Notify button	Agencies: Do NOT use the Notify button. The Notify functionality is not operational (functional) in the Vendor module in SMART.
Previous in List button	Click this button to navigate to the prior record in the list of search results.
Next in List button	Click this button to navigate to the next record in the list of search results.
Add button	Clicking the Add button enables a user to create a new vendor record. Hint: If you have made changes to a vendor record, ensure you use the Save button to save the changes to that vendor record PRIOR to clicking the Add button. If you do not click the Save button, any changes you made to the current vendor record will be lost. The Add button transfers you to a new blank vendor record page.
Update/Display button	Agencies – Do NOT use this button. It is for Central use only.

Fields	Description
Include History button	Agencies – Do NOT use this button. It is for Central use only.
Correct History button	Agencies – Do NOT use this button. It is for Central use only.
Summary link	This link is not operational on the Summary page, as you are already on the Summary page in SMART.
Identifying Information link	Use the Identifying Information link to navigate to the vendor Identifying Information page in SMART
Address link	Use the Address link to navigate to the vendor Address page in SMART
Contacts link	Use the Contacts link to navigate to the vendor Contacts page in SMART
Location link	Use the Location link to navigate to the vendor Location page in SMART
Custom link	Agencies: Do NOT use the Custom link. The State of Kansas is not using the vendor Custom page in SMART.
New Window link	Use the New Window link to open a new (additional) window containing SMART.
Help link	Use the Help link to access and use the SMART UPK's (User Productivity Kits – computer based training tool).
Customize Page link	Agencies: Do not use the Customize Page link. The State of Kansas is not using the Customize Page link in SMART.
http icon	Agencies: Do not use the http icon link. The State of Kansas is not using the http functionality in SMART.
Home link	Use the Home link to return to SMART's main home page and main left navigation menu.
Sign out link	Use the Sign out link to sign out of the current session of SMART (to log out of SMART).

Topic 3: Identifying Information Page

When you are preparing to enter a new vendor into SMART, you need to gather all of the information for the vendor **before** beginning to create the new vendor in SMART. This information includes (but is not limited to):

- Identifying information, including status, classification, and other basic business information that tells you what kind of vendor you are entering
- Physical addresses for the vendor
- Procurement defaults that define your relationship with your vendor, and tell SMART how to handle voucher errors and approvals
- Payment options that establish defaults for payment processing, such as Automated Clearing House (ACH). For **ACH**, you send all applicable payments in one file to your financial institution. If the financial institution is a member of a clearinghouse, then the clearinghouse sends the payments to the vendor's bank for payment.

SAP310 – SMART Vendor Processing

Page name	Navigation
Identifying Information	Vendors > Vendor Information > Add/Update (Find An Existing Value - Enter Search Criteria and Search) > Search Results > Select the desired result > Click the Identifying Information Tab

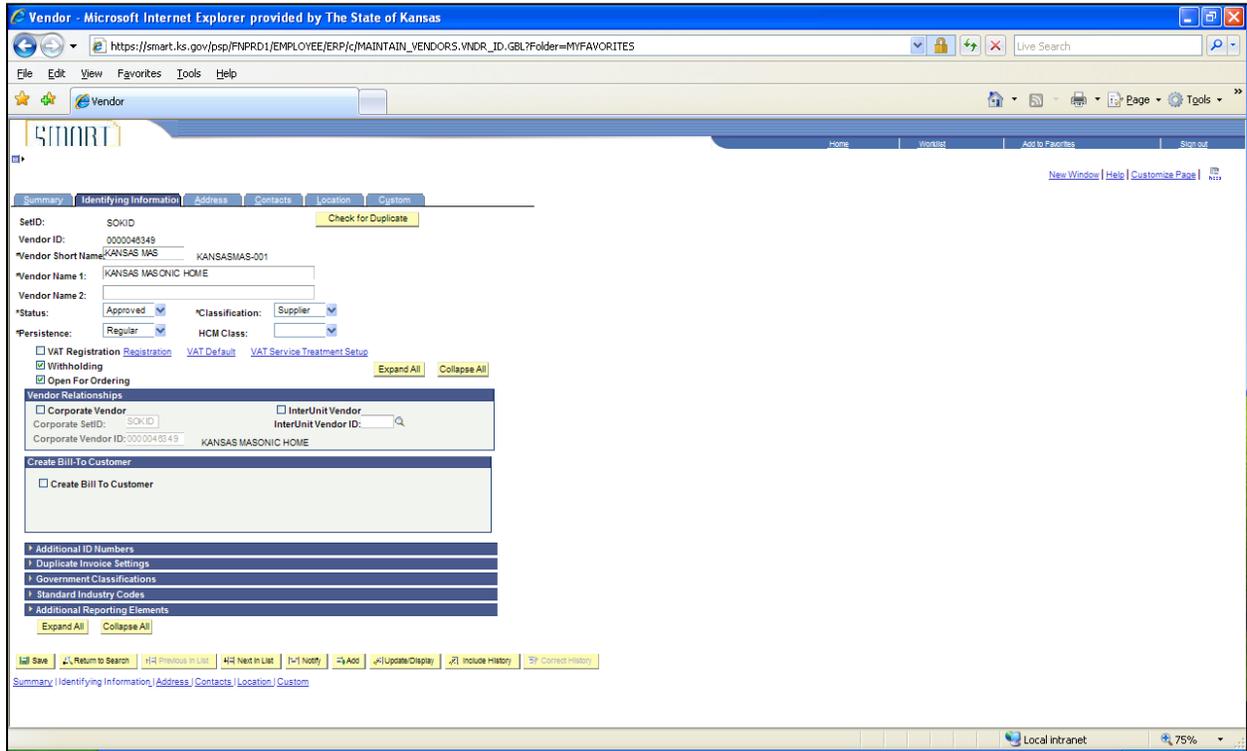


Figure 3.2. Vendor Identifying Information Page

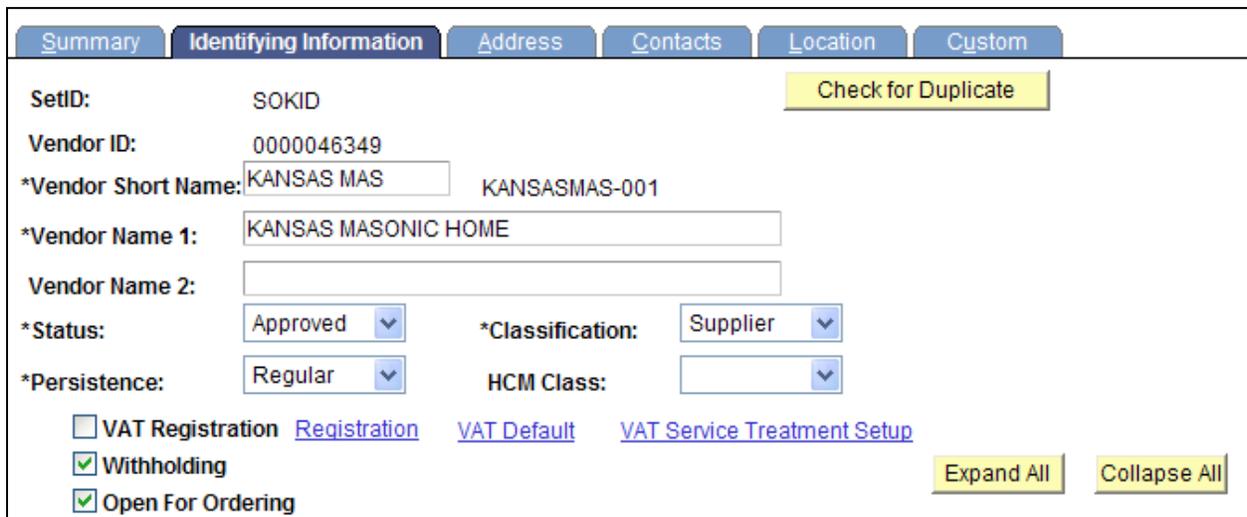
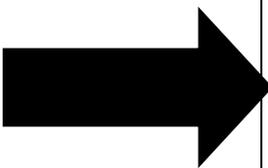


Figure 3.3. Example of a Vendor Identifying Information Page (Detail)

SAP310 – SMART Vendor Processing

Fields	Description
Vendor Short Name	<p>Use the Vendor Short Name field to enter in the short vendor name. The Vendor Short Name field should be entered as:</p> <p>Use ALL CAPS to enter the information.</p> <p>Individuals: The first 10 characters of the Last name, COMMA, followed by as many characters of the first name as possible. Example: JENNOLD,BAILE</p> <p>Agencies: Do NOT use any spaces or special characters when entering a Vendor Short Name for an Individual in SMART.</p> <p>Companies: First10 characters of the business name, excluding The, and, etc. Example: The Kansas Registry is entered as KANSASREGISTE</p> <p>DBA: 'Doing Business As' – Enter the DBA name in the Vendor Short Name field.</p>
Vendor Name 1	<p>Use the Vendor Name 1 field to enter the legal or full name of the vendor which is sourced from the IRS Form W-9. You may use spaces in the vendor's name when entering data in this field.</p> <p>Use ALL CAPS to enter the information</p>
Vendor Name 2	<p>There are two lines for the vendor name (Vendor Name 1 and Vendor Name 2), in case you are dealing with divisions, subsidiaries, or other complex organization entities that require detailed identification. You may use spaces in the vendor's name when entering data in this field.</p> <p>If a vendor is a DBA (Doing Business As), enter the DBA name into the Vendor Name 2 field (and in the Vendor Short Name field).</p> <p>Use ALL CAPS to enter the information</p> <p> Note: It is important to know that when a check is printed, the Vendor Name 2 name will be included on the same line as the Vendor Name 1.</p> <p>For example: Vendor Name 1 field = Joe Green. Vendor Name 2 field = Joe's AC Repair. In this case, the check will print out as 'Joe Green Joe's AC Repair', appearing on the first line of the printed check.</p>

SAP310 – SMART Vendor Processing

Fields	Description
Status	<p>Agencies = <i>Unapproved</i> Status. When an Agency first creates a Vendor record and Saves the record, SMART assigns an <i>Unapproved</i> status to the record.</p> <p>The Central Vendor Processor reviews the <i>Unapproved</i> vendor records on a daily basis and either <i>Approves</i> or <i>Denies</i> the vendor record.</p> <p>Once the Central Vendor Processor changes the Status to <i>Approved</i>, you will be able to use the vendor record in SMART.</p> <p>Note: There is NO email notification sent to an Agency to let them know that a vendor record has been either <i>Approved</i> or <i>Denied</i>. The Agency needs to manually monitor the Status of the vendor in SMART.</p>

SAP310 – SMART Vendor Processing

Fields	Description
Classification	<p>Use the Classification drop down list to select the desired Classification type for the vendor. Valid options include: Attorney, Employee, Medical, or Supplier.</p> <p>Classification Definitions: Attorney: Select the Attorney Classification when establishing an Attorney as a vendor. Note: <i>Do not use the Attorney option if you are not actually paying the attorney.</i> For example: If you are paying an individual care of an attorney, do not select the Attorney option.</p> <p>Employee: Agencies – do not use this option.</p> <p>Medical: Select the Medical Classification when establishing a medical vendor.</p> <p>Supplier: Use the Supplier option for all other types of vendors. <i>Regents: Please use the Supplier option to set up your employees.</i></p> <p>HCM: Agencies – Do NOT select this option! This option is used only by Department of Administration, Payroll Services staff for remittance purposes. Vendors with the HCM Classification must NOT be changed in SMART by Agencies. All checks issued to SMART vendors with the HCM Classification are returned directly via Central Mail to the Department of Administration, Payroll Services staff.</p> <p>If you need to use a different address for the vendor, first search for the vendor to ensure the vendor does not already exist under a different vendor number (which does not have an HCM Classification). If the vendor does not exist under a different Vendor ID number, then set up a new vendor with the desired Classification (do NOT use the HCM option).</p> <p>Alternatively, if the vendor already exists under a different Vendor ID number, then add a new address to the existing vendor record (without the HCM Classification).</p>
Persistence	<p>Use the Persistence drop down list to select the “Regular” option. Agencies – Do NOT use any other drop down list option.</p>
HCM Class	<p>Agencies – do NOT use this field. This field is used only by Department of Administration, Payroll Services staff.</p>

SAP310 – SMART Vendor Processing

Fields	Description
VAT Registration checkbox	The State of Kansas is not using the VAT functionality in SMART. <i>Agencies – do not use this field.</i>
Registration link	The State of Kansas is not using the VAT functionality in SMART. <i>Agencies – do not use this field.</i>
VAT Default link	The State of Kansas is not using the VAT functionality in SMART. <i>Agencies – do not use this field.</i>
VAT Service Treatment Setup	The State of Kansas is not using the VAT functionality in SMART. <i>Agencies – do not use this field.</i>
Withholding checkbox	<p>Select the Withholding checkbox for all U.S. based vendors, EXCEPT non-legal corporations and non-medical corporations. Please ensure the Withholding checkbox is selected for individuals.</p> <p>Select the Withholding checkbox, then click on the Location Tab, click the 1099 link and add the Withholding information. Save the vendor file.</p> <p>Note: SMART will not allow you to Save the vendor file if you do not have the Withholding checkbox on the Identifying Information page selected AND the information in the 1099 Withholding information page completed BEFORE clicking the Save button.</p> <p>SMART requires you to enter the 1099 Withholding information PRIOR to the Vendor Bank Account Information on the Location Tab if you are setting up an ACH payment method for a vendor. More information about this process is covered in the Location Tab topic later in this course.</p>
Open for Ordering checkbox	<p>When selected, this checkbox indicates that purchase requisitions and purchase orders (POs) may be created for this vendor in SMART Purchasing.</p> <p>Defaults as selected – Keep the default selection – do NOT deselect the Open for Ordering checkbox.</p>
Expand All button	Use the Expand All button to open all sections on the Identifying Information page.
Collapse All button	Use the Collapse All button to collapse (close or minimize) all sections on the Identifying Information page.

Vendor Relationships Section – The State of Kansas is not using this section

Create Bill To Customer Section - The State of Kansas is not using this section

Page name	Navigation
Identifying Information	Vendors > Vendor Information > Add/Update (Find An Existing Value - Enter Search Criteria and Search) > Search Results > Select the desired result > Click the Identifying Information Tab Expand the Additional ID Numbers collapsible section

Figure 3.4. Vendor Additional ID Numbers Page

Fields	Description
Customer ID	If this vendor is also a customer in the SMART Accounts Receivable module, enter the valid Customer ID
Our Customer Number	Agencies: Do NOT enter the vendor's TIN in the 'Our Customer Number' field.
Type	Note. For State of Kansas, use W-9. Enter the date the W-9 was obtained in the ID Number field.

Use the **Government Classifications** section to optionally track government-reporting information for this vendor. Vendors receive certain classifications of certification, such as small business or woman-owned, from various government sources.

Page name	Navigation
Identifying Information	Vendors > Vendor Information > Add/Update (Find An Existing Value - Enter Search Criteria and Search) > Search Results > Select the desired result > Click the Identifying Information Tab Expand the Government Classifications collapsible section

Figure 3.5. Vendor Government Classifications Page

Fields	Description
Source	Enter the vendor's certification source
Cert Nbr (certificate number)	Enter the number of the certificate that your vendor received from this source, verifying that the vendor is qualified for this government classification
Gov Class	Enter the type of government classification for which your vendor qualifies

Depending on your agency's reporting requirements, you can apply **Standard Industry Classification (SIC)** codes as part of your vendor header or on your vendor **Location** tab. If you are not doing government reporting, you may choose to define these numbers at the vendor location only.

Page name	Navigation
Identifying Information	Vendors > Vendor Information > Add/Update (Find An Existing Value - Enter Search Criteria and Search) > Search Results > Select the desired result > Click the Identifying Information Tab Expand the Standard Industry Codes collapsible section

Figure 3.6. Vendor Standard Industry Codes Page

Fields	Description
SIC (Standard Industry Code) Type	Select the appropriate type for your vendor

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Fields	Description
SIC Code	<p>In accordance with the SIC Type that you select, SMART provides an appropriate list of SIC Codes. Select a code for the vendor.</p> <p>Based on the SIC information that you select, SMART populates the Parent SIC Code field and the Description field.</p>

The **Additional Reporting Elements** section enables you to enter information required for Federal Procurement Data Systems reporting.

Page name	Navigation
Identifying Information	<p>Vendors > Vendor Information > Add/Update (Find An Existing Value - Enter Search Criteria and Search) > Search Results > Select the desired result > Click the Identifying Information Tab</p> <p>Expand the Additional Reporting Elements collapsible section</p>

▼ Additional Reporting Elements

Common Parent's Name:

Common Parent's TIN:

Type of Contractor:

Sm Disadvantaged Business Prog:

Other Preference Programs:

Veteran-Owned Small Business:

HUBZone Program:

Emerging Small Business

Size of Small Business:

Women-Owned Business

Expand All
Collapse All

Figure 3.7. Vendor Additional Reporting Elements Page

SAP310 – SMART Vendor Processing

Fields	Description
Sm Disadvantaged Business Prog (small disadvantaged business program)	<p>Select a small disadvantaged business program.</p> <p>A Small Disadvantage Business (SDB) program provides business development and federal contracting opportunities for small disadvantaged businesses that would not otherwise qualify for such programs. An SDB enables small businesses to compete in the federal contracting arena and helps expose them to a wider range of subcontracting opportunities that are typically available for large firms only. Programs of this nature are intended to help federal agencies achieve the government-wide goal of 5 percent SDB participation in prime contracting.</p>
Veteran-Owned Small Business	<p>Select a veteran-owned small business program.</p> <p>The veteran-owned small business program provides veteran-owned small businesses maximum practical opportunity to participate in the performance of contracts and subcontracts awarded by any federal agency.</p>
HUBZone Program (historically underutilized business zone program)	<p>Select a HUB Zone program.</p> <p>The HUB Zone Empowerment Contracting program provides federal contracting opportunities for qualified small businesses located in distressed areas.</p>
Emerging Small Business	Select if the vendor qualifies as an emerging small business.
Size of Small Business	If you selected the Emerging Small Business check box, select the applicable business size for this small business from the available options.
Women-Owned Business	Select if this vendor qualifies as a women-owned business.

Topic 4: Address Page

- Agencies use the Address Page only to VERIFY EXISTING vendor address information OR to add NEW vendor information.
- Agencies - Do NOT add a NEW address to correct an EXISTING vendor address in SMART!
- Agencies are unable to edit existing vendor address information in SMART.
- If you need to edit, delete, or modify existing vendor address information, please submit a TM-21 form to the Central Vendor Processor.

Edit, Delete, or Modify Existing Vendor Address Information in SMART

- Use the State of Kansas **TM-21 Form** to request changes or deletions of existing vendor address information in SMART.
- Locate this form: <http://www.da.ks.gov/ar/forms/default.htm>.
- Submit the completed TM-21 form to the Central Vendor Processor by emailing it to: <mailto:Arvendor@da.ks.gov>

Approved vs. Unapproved Vendors

It is important to understand that vendors are Statewide records, they are not Agency specific. It is also important to understand that changes to existing vendor address, location, or banking information, (and saving that information) automatically causes SMART to change the vendor Status to “*Unapproved*”.

When a vendor is in an “*Unapproved*” status, no State Agencies are able to use that vendor (until it has been reviewed and “*Approved*” by a Central Vendor Processor). The Central Vendor Processor runs a report in SMART each morning that provides a list of all vendors with an “*Unapproved*” status. The Central Vendor Processor reviews each vendor individually and either changes the vendor Status from “*Unapproved*” to “*Approved*” or “*Denied*”.

If your Agency needs to update vendor information and use the vendor immediately, please complete a TM-21 form and email the form and request for an immediate vendor review to the Central Vendor Processor at: <mailto:Arvendor@da.ks.gov>

Effective Dates

Use the **Address** page to enter NEW address information for a vendor. In SMART, vendor information is *effective dated*.

New Vendor Information for a **NEW vendor** is added accepting SMART's default Effective Date of **01/01/1901**.

Note: Updates to incorrect **existing vendor** information are made by the Central Vendor Processor who enters an effective date of **today's date** (the current date).

If you are adding NEW address information to an **EXISTING vendor**, then accept the SMART default date of **<today's date>**.

Order of Vendor Information Data Entry

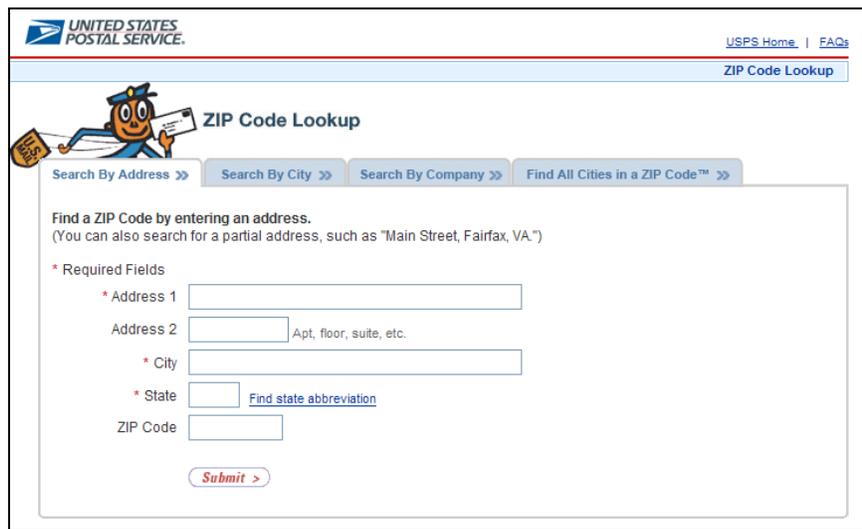
When creating a *new* vendor in SMART, the Address information **MUST** be entered PRIOR to the Location Tab (Payment) information. If you attempt to Save a vendor record without having completed the data entry of vendor information in the correct order, SMART will not allow you to Save the vendor information (SMART will provide you with an error message).

Address Validation – State of Kansas Business Process

Addresses should be entered into SMART as "postal correct". **Agencies MUST validate an address format as 'postal correct' and accurate BEFORE entering the vendor address into SMART on the Address page.** Use the USPS postal website to validate vendor address information PRIOR to entering the address into the vendor Address page. Use the address format from the USPS website as the source for address information to be entered into SMART. The website address for the USPS Zip Code Lookup page is: <http://zip4.usps.com/zip4/>.

Important! If your Agency neglects to enter a vendor's address correctly into SMART, the nightly address validation process (called First Logic) may automatically deny the incorrect address entry, thereby automatically changing the vendor's Status to "*Inactive*" in SMART.

Agencies are unable to use vendors with an "Inactive" Status in SMART.



The screenshot shows the USPS Zip Code Lookup website. At the top left is the USPS logo. At the top right are links for "USPS Home" and "FAQs". Below the logo is a "ZIP Code Lookup" button. The main heading is "ZIP Code Lookup" with a cartoon postman icon. Below the heading are four search options: "Search By Address >>", "Search By City >>", "Search By Company >>", and "Find All Cities in a ZIP Code™ >>". The "Search By Address >>" option is selected. Below the search options is a text box with the instruction: "Find a ZIP Code by entering an address. (You can also search for a partial address, such as 'Main Street, Fairfax, VA.')."

Below the text box are the following fields:

- * Required Fields
- * Address 1
- Address 2 Apt, floor, suite, etc.
- * City
- * State [Find state abbreviation](#)
- ZIP Code

At the bottom of the form is a "Submit >" button.

Figure 3.8. United States Postal Service – Zip Code Lookup (Vendor Address Verification tool)

Use this website to verify Canadian Addresses:

<http://www.canadapost.ca/cp/tools/apps/fpc/business/findByCity>

The screenshot shows the 'Business' section of the Canadian Postal Service website. At the top left is the Canada Post logo. The main header is orange with the word 'Business' and a search bar. Below the header is a navigation menu with links: Home, Products & Services, Rates & Prices, Tools, Shop, Business Solutions, and Programs. A welcome message says 'Welcome! Save time! Sign up | Registered users: Sign in'. Below this is a row of buttons: Find a Postal Code, Find a Rate, Mail & Ship Online, Find a Post Office, Track, and More. The main content area is titled 'By City Address' and contains a form with the following fields: Street Number (required), Number Suffix (dropdown), Unit/Suite/Apt, Street Name (required), Street Type (dropdown), Street Direction (dropdown), City (required), and Province (required). A green 'FIND' button is at the bottom left. On the right side of the form, there is a text box with information: 'Did you know that a properly formatted address speeds up delivery? Find more information in the Canadian Addressing Guide. New Postal Codes are added every month. Find delivery routes for your flyers and other unaddressed campaigns. Get this on your phone'. There are two 'Expand' buttons at the bottom right of the form area.

Figure 3.9. Canadian Postal Service – Look Up By City Address (Vendor Address Verification tool)

Page name	Navigation
Address	Vendors > Vendor Information > Add/Update (Find An Existing Value - Enter Search Criteria and Search) > Search Results > Select the desired result > Click the Address Tab

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Vendor - Microsoft Internet Explorer provided by The State of Kansas

https://smart.ks.gov/psp/FNPRD1/EMPLOYEE/ERP/c/MAINTAIN_VENDORS.VNDR_

SMART

Home | Worklist | Add to Favorites | Sign out

Summary | Identifying Information | **Address** | Contacts | Location | Custom

SetID: SOKID

Vendor: 0000231433 Short Vendor Name: GOMEZMICHE-001 Name: MICHELLE GOMEZ

Vendor Address Find | View All First 1 of 1 | Last

Address ID: 1 Description: MAIN

Details Find | View All First 1 of 1 | Last

Effective Date: 01/01/1901 Status: Active

Country: USA United States

Address 1: 445 NE GREEN ST

Address 2: Address 3: City: TOPEKA

County: SHAWNEE Postal: 66616 State: KS Kansas

Email ID: Payment/Withholding Alt Names

Phone Information Customize | Find | View All First 1 of 1 | Last

Type	Prefix	Telephone	Extension
.Pmnt Loc	001		

Figure 3.10. Vendor Address Page

Payment/Withholding Alt Names

Payment Alternate name

Name 1: Name 2:

Withholding Alternate name

Withholding Name 1: Withholding Name 2:

Figure 3.11. Address Page Detail – Payment/Withholding Alt Names Section (Expanded)

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Fields	Description
Vendor Address Address ID	SMART automatically assigns an Address ID to each address for the vendor.
Vendor Address Description	<p>Use the Description field to enter in a Description that will help distinguish this address from any of the other addresses in SMART for this vendor. For example: MAIN, or CORP ADDR.</p> <p>Agencies: Please do not add actual address information, TIN #'s, payment methods (check or ACH), or personal information in this field.</p> <p>Note: For EXISTING vendors that were converted from STARS (the State of Kansas' prior accounting computer system), the Description begins with two characters representing the STARS suffix number.</p> <p>Example: 46 STARS Vendor Suffix Number, then the address information follows.</p>
Vendor Address + button	Use this '+' button to add an additional address for the vendor.
Vendor Address - button	<p>Agencies – Do NOT use this button. It is for Central use only.</p> <p>Submit a TM-21 Form to the Central Vendor Processor.</p>
Details Effective Date	<p>Accept the SMART default date of 01/01/1901 for a NEW vendor address on a NEW vendor.</p> <p>Accept the SMART default date of <today's date> for a NEW address being added to an EXISTING vendor.</p> <p>Agencies – do NOT change the default date.</p>

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Fields	Description
Details Status	<p>Valid values for this field include: <i>Active</i> and <i>Inactive</i>.</p> <p>Agencies – Select the Active status (default value) to indicate that the address is a valid and active address for the vendor.</p> <p>Do NOT use the ‘Inactive’ status. This is used only by the Central Vendor Processors.</p> <p>Note: Any address that does not pass the First Logic address verification nightly batch process in SMART, is automatically changed to an <i>Inactive</i> status. Any vendor with an <i>Inactive</i> status must be reviewed and changed to an <i>Active</i> status by a Central Vendor Processor before the vendor is able to be used by an Agency.</p>
Details Country	Use the drop down list to locate and select the correct Country code.
Details Address 1	<p>After verifying the correct address on the USPS website, enter the vendor address information.</p> <p>Use ALL CAPS to enter the address information.</p>
Details Address 2	<p>After verifying the correct address on the USPS website, enter the vendor address information.</p> <p>Use ALL CAPS to enter the address information</p>
Details Address 3	<p>The Vendor Address 3 field should NOT be used for “real” address information. The Vendor Address 3 field is used to enter and store a vendor’s Medicaid Provider number.</p> <p>Agencies: Do NOT enter vendor address information in the Address 3 field.</p> <p>Enter the vendor’s Medicaid provider number in the Address 3 field (if applicable).</p> <p>Use ALL CAPS to enter the information.</p>
Details City	<p>After verifying the correct address on the USPS website, enter the vendor’s City.</p> <p>Use ALL CAPS to enter the information</p>
Details County	<p>If known, enter the vendor’s County.</p> <p>Use ALL CAPS to enter the information</p>

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Fields	Description
Details Postal	After verifying the correct address on the USPS website, enter the vendor zip code (postal code), including the + 4 zip.
Details State	Use the drop down list to locate and select the correct State code.
Details Email ID	Enter the email address that relates to this Address for the vendor.
Details + button	Use the '+' button to add (create) new Address information for the vendor.
Details - button	Agencies – Do NOT use this button. It is for Central use only. Submit a TM-21 Form to the Central Vendor Processor.
Payment Alternate name Name 1	If information is entered in the Payment/Withholding Alternate Names section, SMART overrides the name that you specified on the vendor Identifying Information page. This feature may be useful if a vendor does business under a different name. For example: 'Smith Consulting' may be the vendor name, but the vendor requests to receive payments and report 1099 Withholdings under the name of 'Joe Smith'. Agencies: Enter an alternate name for the vendor to be used on checks. Do NOT put an Agency's Account Number in this field! Use ALL CAPS to enter the information.
Payment Alternate name Name 2	Agencies: Enter an alternate name for the vendor to be used on checks. Do NOT put an Agency's Account Number in this field! Use ALL CAPS to enter the information.
Withholding Alternate name Withholding Name 1	Enter an alternate name for the vendor to be used for 1099 reporting. Use ALL CAPS to enter the information.

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Fields	Description
Withholding Alternate name Withholding Name 2	Enter an alternate name for the vendor to be used for 1099 reporting. <i>Use ALL CAPS to enter the information.</i>
Phone Information '*Type'	The '*Type' field is NOT used to store or record vendor phone information. The '*Type' field is used by the State of Kansas to store payment location information for the vendor. <i>Agencies: Use the '*Type' drop down listing to choose the option of ".Pymnt Loc".</i> <i>Do NOT choose any other option from the drop down listing.</i> When adding a NEW vendor, the Address must be related to the Location number (sourced from the Location Tab page). The Location code in SMART is used to map the payment methods of the vendor. Each additional address for the vendor will be added to a Location based on the vendor's choice of payment method (sourced from the Location Tab page). Additional Vendor Payment Location information is covered in the Location Page topic.

Fields	Description
<p>Phone Information Prefix</p>	<p>The 'Prefix' field is NOT used to store or record vendor phone information.</p> <p>The 'Prefix' field is used by the State of Kansas to store the Payment Location code for the vendor.</p> <p>Agencies: Use the 'Prefix' field to manually enter the desired Payment Location code. The Payment Location code is sourced from the Location Tab > Location Section > *Location field.</p> <p>For example: If the vendor only has one payment method, the Location code (which is entered into the Prefix field on the Address Page) will be '001'. The Prefix field on the Address Tab is used to keep track of Vendor Payment Method information for each vendor address, thereby indicating which address location code the vendor's payment should be remitted (sent) to.</p> <p>If there are two Addresses for one vendor Location (payment method), then each Address must be mapped to the correct Location code (sourced from the Location Tab page – based on vendor's preference for payment method). Either '001' or '002' – based on the vendor's preference of what type of payment they want to receive for each address.</p> <p>For Agencies that use Interfaces to upload information into SMART: It is important that you select the correct Location code in the Prefix field, as this is the field that determines the method of payments made to your vendors.</p> <p>Additional Payment Location information is covered in the Location Page topic.</p>
<p>Phone Information Telephone</p>	<p>Enter the contact telephone number for this vendor address. Telephone information is entered in the format of: xxx/xxx-xxxx.</p>
<p>Phone Information Extension</p>	<p>Enter the telephone extension number for this vendor address (if applicable).</p>
<p>Phone Information + button</p>	<p>Use the '+' button to add a contact telephone number for this vendor address.</p>
<p>Phone Information - button</p>	<p>Agencies – Do NOT use this button. It is for Central use only. Submit a TM-21 Form to the Central Vendor Processor.</p>

Add a New Address to an Existing Vendor

- 1. Locate and select the Existing Vendor in SMART using the **Review Vendors** page
- 2. Select the **Address Tab**

Summary	Identifying Information	Address	Contacts	Location	Custom	
SetID:	SOKID					
Vendor ID:	0000046349					
Vendor Short Name:	KANSAS MAS		KANSASMAS-001			
Vendor Name:	KANSAS MASONIC HOME					
Order:	KANSASMAS-001		Remit To:	KANSASMAS-001		
	401 S SENECA ST			401 S SENECA ST		
	WICHITA, KS 67213-5541			WICHITA, KS 67213-5541		
Status:	Approved		Last Modified By:	FIRSTLOGIC		
Persistence:	Regular		Last modified date:	02/26/2011 9:46AM		
Classification:	Supplier		Created By:	CNV		
HCM Class:			Created Date/time:	06/07/2010 12:00AM		
Open for Ordering:	Yes		Last Activity Date:	02/15/2011		
Withholding:	Yes					
VAT:	No					
Save	Return to Search	Notify	Add	Update/Display	Include History	Correct History
Summary Identifying Information Address Contacts Location Custom						

Figure 3.12. Vendor Address Page

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3. **Address ID: 1** is brought up. Click on the **“+” button** to add the new address information.

The screenshot displays the SAP Vendor Address form. At the top, there are tabs for Summary, Identifying Information, Address, Contacts, Location, and Custom. The main header shows SetID: SOKID and a link for Vendor Address Search. Below this, Vendor information is listed: 0000046349, Short Vendor Name: KANSASMAS-001, and Name: KANSAS MASONIC HOME.

The Vendor Address section is active, showing Address ID: 1 and Description: 00 STARS Vendor Suffix Number. A '+' button is highlighted with a black box. Below this is the Details section, which includes fields for Effective Date (01/01/1901), Status (Active), Country (USA), Address 1 (401 S SENECA ST), City (WICHITA), State (KS), and Postal (67213-5541). There are also sections for Payment/Withholding Alt Names and Phone Information.

*Type	Prefix	Telephone	Extension
.Pymnt Loc	001		

Figure 3.13. Vendor Address – + button (To add a new vendor address)

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Vendor: 0000046349 Short Vendor Name: KANSASMAS-001 Name: KANSAS MASONIC HOME

Vendor Address Find | View All First 2 of 5 Last

Address ID: 5
Description:

Details Find | View All First 1 of 1 Last

Effective Date: 09/24/2011
Status: Active
Country: USA United States

Address 1:
Address 2:
Address 3:
City:
County: Postal:
State:
Email ID:

Payment/Withholding Alt Names

Phone Information Customize | Find | View All First 1 of 1 Last

*Type	Prefix	Telephone	Extension

Figure 3.14. Vendor Address page – Details (Complete to add a new vendor address)

4. Add a **Description**. Example: Main, Corporate, Topeka etc.
5. **Effective Date**: Accept the default date of <today's date> – **Do NOT change this date**.
6. Enter the validated address information, using ALL CAPS in the **Address 1** and **Address 2** fields.
7. Enter the Medicare number for the vendor in the **Address 3** field (if applicable)
8. **Phone Information, *Type**: Select the **‘.Pymnt Loc’** option from the drop down list
9. **Phone Information, Prefix**: Enter the **Location code**. Example: 001, or 002
(This information is sourced from the Location Tab and represents how the vendor is paid - either by SYSTEM Check or ACH. You need to map the address to the vendor's preferred method [correct location] for payment)
10. Click the **Save button** (bottom left corner of the page) to save your changes to the vendor record.

Topic 5: Contacts Page

The Vendor Contact Page is a tool that is provided to keep track of contacts within a vendor. An unlimited number of vendor contacts and their roles can be entered for each vendor so you can easily determine whom to contact with questions. You can also use this information to determine the business reason why a contact might want to talk to you before you return their call.

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The Vendor Contact page is optional for Agencies to use.

Page name	Navigation
Vendor Contact	Vendors > Vendor Information > Add/Update (Find An Existing Value - Enter Search Criteria and Search) > Search Results > Select the desired result > Click the Contacts Tab

Vendor Contact

SetID: SOKID

Vendor: 0000000194 Short Vendor Name: BURGESS EN-001 Name: BURGESS ENGINEERING INC

Vendor Contact Find | View All First 1 of 1 Last

Contact ID: 1 + -

Description:

Details Find | View All First 1 of 1 Last

Eff Date: 08/08/2011 + -

Status: Active v

Type: v

Name:

Title:

Address: 🔍

Internet: [View Internet Address](#)

Email ID:

Phone Information Customize | Find | View All First 1 of 1 Last

*Type	Prefix	Telephone	Extension	
v	<input type="text"/>	<input type="text"/>	<input type="text"/>	+ -

Save Return to Search Previous in List Next in List Notify Add Update/Display

[Summary](#) | [Identifying Information](#) | [Address](#) | [Contacts](#) | [Location](#) | [Custom](#)

Figure 3.15. Contacts Page – Vendor Contact Details

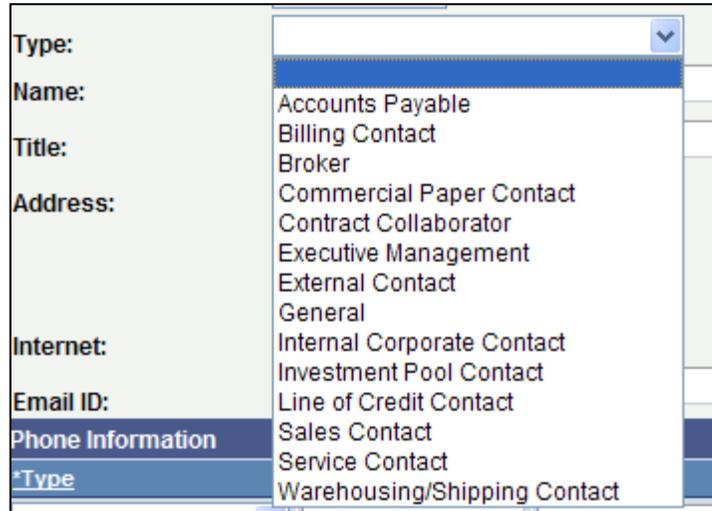


Figure 3.16. Contacts Page – Vendor Contact Details – Type (Detail)

Fields	Description
Vendor Contact Contact ID	SMART auto numbers each Contact with a Contact ID number when you first enter and save contact information.
Vendor Contact Description	Use this free form field to enter a business description for the Contact person at the vendor.
Vendor Contact + button	Use the + button to add a new contact record.
Vendor Contact '-' button	Agencies – Do NOT use this button. It is for Central use only. Submit a TM-21 Form to the Central Vendor Processor.
Details Eff Date	The Eff (Effective) Date field defaults with the SMART system date of 01/01/1901. Agencies - Do NOT change the default date.
Details Status	Use the drop down listing to select the Status of the contact: Active: Select the Active status to indicate that this contact is a current and active contact at the vendor. To Inactivate a vendor record: Submit a TM-21 Form to the Central Vendor Processor.

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Fields	Description
Details Type	Select the appropriate type for the contact at the vendor. Select a value from the drop down list. Values include: Accounts Payable, Billing Contact, Broker, Commercial Paper Contact, Contract Collaborator, Executive Management, External Contact, General, Internal Corporate Contact, Investment Pool Contact, Line of Credit Contact, Sales Contact, Service Contact, or Warehouse/Shipping Contact.
Details Name	Enter the name of the contact person in this field. Enter in the format of: First name Last name
Details Title	Enter the job title of the contact person in this field. This is a free text field.
Details Address	Select the desired address from the available options in the Lookup list. Click the Lookup (magnifying glass) icon to access the list and make your selection.
Details Internet	Enter the internet (website URL) address for the company or contact in this field.
Details View Internet Address Link	This link is not operational in SMART. Please do NOT use this link.
Details Email ID	Use this field to manually enter the contact's email address. This is a free text field.
Details + button	Click the + button to add a new record.
Details ‘-‘ button	Agencies – Do NOT use this button. It is for Central use only. Submit a TM-21 Form to the Central Vendor Processor.
Phone Information Type	Use the 'Type' field to select the desired telephone Type. Select one from the following list of values: Business, Campus, Cellular, Dormitory, FAX, Home, Main, Other, Pager 1, or Pager 2.
Phone Information Prefix	Agencies: Please do NOT use the Prefix field.
Phone Information Telephone	Use the Telephone field to enter in the contact phone number for the vendor. The phone number is entered in the format of: xxx/xxx-xxxx
Phone Information Extension	Use the Extension field to enter in the desired phone extension number (if applicable).
Phone Information + button	Use the + button to add a phone number.

Fields	Description
Phone Information '-' button	Agencies – Do NOT use this button. It is for Central use only. Submit a TM-21 Form to the Central Vendor Processor.

Topic 6: Location Page

- Agencies use the Location Page only to VERIFY EXISTING vendor payment/banking information OR to add NEW vendor payment/banking information.
- Agencies - Do NOT add NEW payment/banking information to correct existing vendor payment/banking information in SMART.
- Agencies are unable to edit existing vendor payment/bank account information in SMART.
- If you need to edit, delete, or modify existing vendor payment/banking information, please submit either a completed DA-130 form or a completed DA-184 form to the Central Vendor Processor.

Location – Definition

In the SMART Vendor module, a vendor *address* is a mailing address. A *location* is the payment/banking information for the vendor.

There is one vendor location for each bank account/payment method for the vendor. Locations are assigned location code numbers sequentially, starting with 001,002, 003, etc.

Each vendor has Location code '001' as its default Location code number. If a vendor uses the same bank account/payment method across its business, only one location is entered in SMART.

Note: Location 001 is NOT always a SYSTEM CHECK. If the vendor was set up initially with ACH as a method of payment, then Location 001 will be ACH and not SYSTEM CHECK.

For example: Company ABC has offices in Kansas City, Chicago, and St. Louis. Each office has different bank accounts/payment methods. In this case, you need to set up the vendor with three different location codes (that is, three sets of rules), one for each office.

If all three offices use exactly the same bank account/payment method, you set up only one location code for the vendor.

When setting up a NEW vendor or vendor Location, ensure that the addresses from the **Address** page are mapped to the correct location code number.

Edit, Delete, or Modify Existing Vendor Address Information in SMART

- Use either the State of Kansas **DA-130 Form** or the **DA-184 Form** to request changes or deletions of existing vendor payment/banking information in SMART.
- **State of Kansas - DA-130 Form** - Authorization for Electronic Deposit of Vendor Payment. Use this form to submit vendor bank account information to the Central processing office. To obtain a copy of the DA-130 Form please contact Accounts and Reports by phone: (785) 296-7917.
- **State of Kansas - DA-184 Form** - Authorization For Direct Deposit of Employee Pay and or Employee Travel . Regents – Please use the DA-184 Form to submit Regent Employee Information to the Central processing office. Locate this form: <http://www.da.ks.gov/ar/pm/Forms/Default.htm>.
- **Submit the completed DA-130 Form or the completed DA-184 Form** to the Central Vendor Processor by emailing it to: <mailto:Arvendor@da.ks.gov>

Approved vs. Unapproved Vendors

It is important to understand that vendors are Statewide records, they are not Agency specific. It is also important to understand that changes to existing vendor address, location, or banking information, (and saving that information) automatically causes SMART to change the vendor Status to “*Unapproved*”.

When a vendor is in an “*Unapproved*” status, no State Agencies are able to use that vendor (until it has been reviewed and “*Approved*” by a Central Vendor Processor). The Central Vendor Processor runs a report in SMART each morning that provides a list of all vendors with an “*Unapproved*” status. The Central Vendor Processor reviews each vendor individually and either changes the vendor Status from “*Unapproved*” to “*Approved*” or “*Denied*”.

If your Agency needs to update vendor information and use the vendor immediately, please complete DA-130 Form or a DA-184 Form and email the form with a request for an immediate vendor review to the Central Vendor Processor at: <mailto:Arvendor@da.ks.gov>

Effective Dates

Use the **Location** page to enter NEW vendor payment/banking information. In SMART, vendor information is *effective dated*.

New Vendor Information for a NEW vendor is added accepting SMART’s default Effective Date of **01/01/1901**.

Note: Updates to existing vendor information are made by the Central Vendor Processor who enters an effective date of **today’s date** (the current date).

If you are adding NEW information to an EXISTING vendor, accept the SMART default Effective Date of **<today’s date>**.

Order of Vendor Information Data Entry

When creating a *new* vendor in SMART, the Address information **MUST** be entered **PRIOR** to the Location Tab (Payment) information. If you attempt to Save a vendor record without having completed the data entry of

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vendor information in the correct order, SMART will not allow you to Save the vendor information (SMART will provide you with an error message).

Page name	Navigation
Location	Vendors > Vendor Information > Add/Update (Find An Existing Value - Enter Search Criteria and Search) > Search Results > Select the desired result > Click the Location Tab

Summary
Identifying Information
Address
Contacts
Location
Custom

SetID: SOKID

Vendor: 0000000194 Short Vendor Name: BURGESS EN-001 Name: BURGESS ENGINEERING INC

A vendor location is a default set of rules which define how you conduct business with a vendor.

Location Find | View All First ◀ 1 of 1 ▶ Last

*Location: Default + -

Description: [RTV Fees](#)

Details Find | View All First ◀ 1 of 1 ▶ Last

*Effective Date: + -

Status: ▼

Options: [Payables](#) [Procurement](#) [Sales/Use Tax](#) [1099](#) Expand All Collapse All

- ▶ Additional ID Numbers
- ▶ Comments
- ▶ Internet Address
- ▶ VAT

Expand All Collapse All

Save
Return to Search
Previous in List
Next in List
Notify
Add
Update/Display

[Summary](#) | [Identifying Information](#) | [Address](#) | [Contacts](#) | [Location](#) | [Custom](#)

Figure 3.17. Location Page – Vendor Location Details

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Fields	Description
Location *Location	<p>There is one vendor location for each bank account/payment method for the vendor. Note. These are Statewide locations (not per Agency)</p> <p>Locations should be assigned location code numbers sequentially, starting with 001,002, 003, etc.</p> <p>Each vendor MUST have one Location code marked as its default Location.</p> <p>If a vendor uses the same bank account/payment method across its business, only one location is entered in SMART.</p> <p>If a vendor uses multiple bank accounts/payment methods, multiple locations are entered into SMART.</p>
Location Default Checkbox	<p>The State of Kansas is using this field for SHARP remittance payments to SMART. The Default Checkbox in the Location section is used to select the correct Location code (and ultimately the correct payment method, and address, for the vendor).</p> <p>The Default Checkbox MUST BE SELECTED to deliver the AP module functionality (processes).</p> <p>The selection of the Default Checkbox allows this Location Code to be used in conjunction with the Address Location.</p>
Location + button	Use the + button to add a NEW Location (banking/payment method) for the vendor.
Location '-' button	<p>Agencies – Do NOT use this button. It is for Central use only.</p> <p>Submit a TM-21 Form to the Central Vendor Processor to have a vendor Location removed.</p>

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Fields	Description
Location Description	<p>If the vendor desires to receive a paper check, enter the value of “SYSTEM CHECK” in the Description field.</p> <p>If the vendor desires an ACH (Automated Clearing House) payment (direct bank account deposit), enter the value of “ACH *****XXXX”, where ‘XXXX’ represents the last four digits of the vendor’s bank account number.</p> <p>If there is no banking information that needs to be entered in the Description field, please enter the value of “SYSTEM CHECK”. This prompts SMART to generate and print a paper check for the vendor.</p> <p>WIR – Indicates a wire payment. This option is used primarily by HCM vendors.</p> <p>Agencies – <i>Please contact the Department of Administration PRIOR to selecting this option for a new vendor, to determine if this is an appropriate selection for the vendor record. Thank you.</i></p>
Location RTV Fees Link	The State of Kansas is not using this link.
Details Effective Date	<p>Accept the SMART default date of 01/01/1901 for a NEW vendor location on a NEW vendor.</p> <p>Accept the SMART default date of 01/01/1901 for a NEW location being added to an EXISTING vendor.</p> <p>Agencies – do NOT change the default date.</p>
Details Status	<p>Active: Select the <i>Active Status</i> to indicate that the Location information is effective and active for the vendor.</p> <p>Inactive: <i>To Inactivate a Location’s Status, please complete and submit either a DA-130 Form or a DA-184 Form to the Central Vendor Processor.</i></p>
Details + button	Click the + button to add a new set of details for the vendor.

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Fields	Description
Details '-' button	Agencies – Do NOT use this button. It is for Central use only. Submit a TM-21 Form to the Central Vendor Processor.
Details Expand All Button	Click the Expand All button to open (expand) all the sections on the Location Page.
Details Collapse All Button	Click the Collapse All button to close (collapse) all the sections on the Location Page.
Details – Options Payables Link	Click the Payables Link to open the Payables Options page . The use of the Payables Options page is covered later in this course.
Details – Options Procurement Link	Click the Procurement Link to open the Procurement Options page . The use of the Procurement Options page is covered later in this course.
Details – Options Sales/Use Tax Link	The State of Kansas is not using the Sales/Use Tax functionality in SMART. Please do NOT use this link.
Details – Options 1099 Link	Click the 1099 Link to open the Withholding Vendor Information page . The use of the Withholding Vendor Information page is covered later in this course.
Details – Options Additional ID Numbers Section	The State of Kansas is not using this section. Please do NOT use this section.
Details – Options Comments Section	The State of Kansas is not using this section. Please do NOT use this section.
Details – Options Internet Address Section	The State of Kansas is not using this section. Please do NOT use this section.
Details – Options VAT Section	The State of Kansas is not using the VAT functionality in SMART. Please do NOT use this section.

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Fields	Description
Expand All button	Click the Expand All button to open (expand) all sections on the Payables Options page.
Collapse All button	Click the Collapse All button to close (collapse) all sections on the Payables Options page.
Invoicing Section	The State of Kansas is not using the Invoicing section. Agencies: Please do NOT use this section.
Remitting Section	The State of Kansas is not using the Remitting section. Agencies: Please do NOT use this section.
Additional Payables Options section	Click the Expand Section button (triangle button to the left of the title) to open the section. This section contains the Additional Payables Options information for the vendor. The use of the Additional Payables Options section is covered later in this course.
Matching/Approval Options section	The State of Kansas is not using this section.
Electronic File Options section	The State of Kansas is not using this section.
Self Billed Invoice Options section	The State of Kansas is not using this section.
Vendor Bank Account Options section	Click the Expand Section button (triangle button to the left of the title) to open the section. This section contains the Vendor Bank Account Options information for the vendor. The use of the Vendor Bank Account Options section is covered later in this course.
Vendor Type Options section	The State of Kansas is not using this section.
HIPPA Information section	The State of Kansas is not using this section.
Debit Memo Options section	The State of Kansas is not using this section.

Additional Payables Options Section

Use the **Additional Payables Options** section to set up ACH payment information for this vendor.

Page name	Navigation
Additional Payables Options	Vendors > Vendor Information > Add/Update (Find An Existing Value - Enter Search Criteria and Search) > Search Results > Select the desired result > Click the Location Tab > Click the Payables Link > Click the Expand Section button (triangle to the left of the title) for the Additional Payables Options section

Figure 3.19. Additional Payables Options Section

Fields	Description
Payment Control Section	The State of Kansas is not using this section.
Bank Section	The State of Kansas is not using this section.
Draft Processing Control	The State of Kansas is not using this section
Additional Payment Information Payment Method – First Drop Down List	Select the “Specify” option.

Fields	Description
Additional Payment Information Payment Method - Second Drop Down List	Select the “ Automated Clearing House ” option.
Additional Payment Information Layout Option	The State of Kansas is not using this field.
Additional Payment Information Layout	The State of Kansas is not using this field. DO NOT CHANGE THE LAYOUT OPTION!
Additional Payment Information Handling Options	The State of Kansas is not using this field.
Additional Payment Information Handling	The State of Kansas is not using this field.
Additional Payment Information	The State of Kansas is not using this field.
Reschedule ID	The State of Kansas is not using this field.
Holiday Processing Options Section	The State of Kansas is not using this section.
Document Sequencing Type Section	The State of Kansas is not using this section.

Vendor Bank Accounts Section

Use the **Vendor Bank Accounts** section to enter the vendor’s bank account information. Use the **DA-130 Form** and/or a **Voided check (for individuals)** from the vendor to enter the information in this section.

Note: The Agency is responsible for adding electronic deposit information when you are adding a NEW vendor. The **DA-130 Form** must be completed and emailed to the Central Vendor Processor once you have set up the new vendor in SMART.

Only Central Vendor Processors are able to make changes to an existing vendor record in SMART. If you need to make changes to a vendor’s banking information, or if you need to cancel authorization for an electronic deposit to a vendor, you must complete a new DA-130 Form and submit it via email to the Central Vendor Processor.

Page name	Navigation
Vendor Bank Accounts	Vendors > Vendor Information > Add/Update (Find An Existing Value - Enter Search Criteria and Search) > Search Results > Select the desired result > Click the Location Tab > Click the Payables Link > Click the Expand Section button (triangle to the left of the title) for the Vendor Bank Accounts section

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Vendor Bank Accounts
Find | View All First 1 of 1 Last

Default

Descr:

Country: United States

Bank Name:

Branch Name:

Bank ID Qualifier: UMB Bank Account Type:

Bank Identifier Code:

Bank ID:

Bank Account Number:

DFI Qualifier: Transit Number DFI ID: 101100029

IBAN:

Vendor Type Options

HIPAA Information

Debit Memo Options

Figure 3.20. Vendor Bank Accounts Section

Fields	Description
Envelope Button	Click the envelope button to open the Bank Address page. Use the Bank Address page to enter the address for the bank.
Telephone Button	Click the Telephone button to open the Phone Information page. Use the Phone Information page to enter the telephone information for the bank.
Routings (Building) Button	Click the Routings Button to open the Intermediary Bank Routings page. Use the Intermediary Bank Routings page to enter the Routing Information for the Bank account.
Default Checkbox	Agencies – Please do not use this.
Descr	Use the Descr field to enter a description for the bank account information. "ACH **** ----".
Country	Enter the Country code into the Country field. Use the Lookup button if necessary to look up international country codes.
Bank Name	Use the Bank Name field to enter the name of the bank. Use ALL CAPS to enter the bank name.
Branch Name	Use the Branch Name field to enter the branch name for the bank. Use ALL CAPS to enter the branch name.

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Fields	Description
Bank ID Qualifier	Use the Lookup button to locate and select the correct Bank ID Qualifier from the available list of options in SMART.
Bank Identifier Code	Agencies – Please do not use this.
Bank ID	Use the Lookup button to locate and select the correct Bank ID from the available list of options in SMART (Bank ID number must match the Bank number on the voided check you received from the vendor) Note: Once a Bank ID number is entered and saved, SMART masks the Bank ID number with a series of ***** for security purposes.
Bank Account Number	Use the Bank Account Number field to enter the vendor's bank account number. Note: Once saved, bank account numbers are masked for security purposes. Only the last 4 digits of the bank account number are able to be viewed by Agencies. The rest of the bank account number is masked with a series of *****.
DFI Qualifier	Use the Lookup button to locate and select the correct DFI Qualifier from the available list of options in SMART.
IBAN	Agencies – Please do not use this.
Account Type drop down list	Use the Account Type drop down list to locate and select the correct Account Type from the available list of options in SMART. Checking Account – use “ Check Acct ” Savings Account – use “ Time Dep ” Do not use any other options from this list.
Branch ID	Agencies – Please do not use this.
Check Digit	Agencies – Please do not use this.
DFI ID	Agencies – Please do not use this.
Search button	Agencies – Please do not use this.
+ button	Please review ALL existing bank account records PRIOR to adding a NEW bank account for the vendor. Click the + button to add a NEW bank account to the vendor. Note: You must have a completed DA-130 Form/DA-184 Form and/or a voided check.
‘-‘ button	Agencies – Do NOT use this button. It is for Central use only. Submit a TM-21 Form to the Central Vendor Processor to have a vendor's bank account information removed/inactivated.

Fields	Description
OK button	After you have completed entering the information on this page, <i>click the OK button to save your changes.</i>
Cancel button	If you do not want to save the changes you have made on this page, <i>click the Cancel button to discard the changes you made.</i>

Topic 8: Procurement Link and Procurement Options page

If the vendor agrees to accept business procurement cards (P-Cards) as a method of payment, use the **Procurement Options** page to enter the procurement card information for the vendor. Selecting this option and entering the procurement information allows you to pay the vendor using a business procurement card, rather than a check or an ACH payment.

Page name	Navigation
Procurement Options	Vendors > Vendor Information > Add/Update (Find An Existing Value - Enter Search Criteria and Search) > Search Results > Select the desired result > Click the Location Tab > Click the Procurement Link > Click the Expand Section button (triangle to the left of the title) for the Procurement Card Options section

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Summary | Identifying Information | Address | Contacts | **Location** | Custom

SetID: SOKID
Vendor: 0000046349 Short Vendor Name: KANSASMAS-001 Name: KANSAS MASONIC HOME

A vendor location is a default set of rules which define how you conduct business with a vendor.

Location Find | View All First 1 of 2 Last

*Location: 001 Default + -

Description: System Check [RTV Fees](#)

Details Find | View All First 1 of 1 Last

*Effective Date: 01/01/1901 + -

Status: Active

Options: [Payables](#) **[Procurement](#)** [Sales/Use Tax](#) 1099 [Expand All](#) [Collapse All](#)

▶ Additional ID Numbers

▶ Comments

▶ Internet Address

▶ VAT

[Expand All](#) [Collapse All](#)

Figure 3.21. Vendor Location Tab – Procurement Link

- Select the **Procurement Link** on the **Location Tab** to open the **Procurement Options** page.

- Select the **Accepts Procurement Card as payment method** checkbox
 - o Select “**Contact Cardholder**” from the ***ProCard Dispatch Option** drop down list
 - o In the **Types of Procurement Card Accepted**, select “**Visa**” from the **Card Type** drop down list
 - o **Agencies – DO NOT enter any information in the Vendor Card Settings section!**
 - o Click the **OK button** at the bottom left of the screen to save your changes.

The screenshot displays the 'Procurement Card Information' section of the SAP310 SMART Vendor Processing interface. It includes the following elements:

- Additional Procurement Options** (expanded)
- Dispatch Methods** (expanded)
- POA Settings** (expanded)
- RTV Options** (expanded)
- Procurement Card Information** (expanded)
 - Accepts Procurement Card as payment method**
 - *ProCard Dispatch Option:** Contact Cardholder (dropdown)
 - Types of Procurement Card Accepted** table:

	Card Type		
1	Visa	+	-
 - Vendor Card Settings** (partially obscured by a large black 'no' symbol):
 - Vendor Card: (dropdown)
 - Card Type:
 - Card Issuer:
 - Expiration Date:
 - Use Vendor Card as default payment method on Purchase Orders
 - Allow Override Vendor Card

Figure 3.23. Procurement Options Page – Procurement Card Information Section

Topic 9: 1099 Link and Withholding Vendor Information page

1099 Information

What is a 1099? It is an informational return to report various type of income other than wages.

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The IRS requires the State of Kansas to issue 1099's to reportable entities (vendors) for services, rentals, awards, certain type of grants, interest, dividends, and certain real estate purchases.

The State of Kansas, Department of Administration submits five types of 1099 Forms to the IRS:

- 1099-MISC: Services, rents, awards
- 1099-G: Governmental payments (tax refunds are the Dept of Revenue)
- 1099-INT: Interest
- 1099-DIV: Dividends
- 1099-S: Real estate

Two criteria must be met in order for 1099 reporting to occur for a vendor:

- The vendor must be subject to 1099 reporting
- The payment must be reportable

What vendors are NOT (currently) reportable?

- Corporations are NOT reportable UNLESS they provide medical or legal services
- Governments
- Tax Exempt Organizations

What is LLC?

LLC stands for Limited Liability Company. The federal government does not recognize an LLC as a classification for federal tax purposes. An LLC can be a corporation, partnership or sole proprietorship. The W-9 Form should indicate the Type of entity the vendor is.

Guide to completing the Withholding Vendor Information page

- SMART will not allow you to save a vendor record if you enter the ACH information in BEFORE entering the 1099 information. Ensure you complete the Address Tab before the Location Tab when setting up a new vendor record in SMART.

- **Withholding Vendors**

Complete the 1099 Information section AND the 1099 Reporting Information section.

Examples:

- Medical Corporations
- Attorneys
- LLC – Limited Liability Company

- **Non-Withholding Vendors**

Complete only the 1099 Reporting Information section.

Examples:

- Incorporated
- Corporation
- Foreign Vendors

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FORM 1099 MISC - EXAMPLES OF REPORTABLE PAYMENTS	
<p>RENTS (Form 1099-MISC, Box 1)</p> <ul style="list-style-type: none"> Office Space Parking Lot Space Welfare Rental Assistance (to Landlords) Equipment Surface Royalties Real Property Other Property 	<p>NON-EMPLOYEE COMPENSATION (Form 1099-MISC, Box 7)</p> <ul style="list-style-type: none"> Accountants/Auditors Advertising Services Appraisers Architects Armored Car Services Attorneys* (who are not your employees) (Includes Corporations)* Auto Repair Board Members Chaplains Cleaning Services Commercial Repairs – Hwy Vehicles Computer Programming Computer Repairs Construction Services Consultants Contracted Repairs Court Appointed Workers Court Reporters Custodial / Maintenance Design & Testing Engineers Evaluation Consultant Expert Witnesses Extermination Services Graphic Artist Institution Contracts Janitorial Services Keypunch Services Landscapers, Locksmiths Laundry Services Maintenance Agreements Non-Employee Allowance Occasional Salaries & Wages (to Non-Employees) Parcel & Delivery Services Photographers Printing Services Prison Labor Allowance
<p>ROYALTIES (Form 1099-MISC, Box 2)</p> <ul style="list-style-type: none"> Literary rights Copyrights Publishing Licensing fees 	
<p>OTHER INCOME (Form 1099-MISC, Box 3)</p> <ul style="list-style-type: none"> Awards (Nonemployee) Prizes (Nonemployee) 	
<p>MEDICAL & HEALTH CARE SERVICES (Form 1099-MISC, Box 6, includes all payments to Medical Service Corporations)</p> <ul style="list-style-type: none"> Ambulance Services Dentists/Dental Services Doctors/Medical Services Hospitals** (**except if tax exempt or owned/operated by a governmental entity) Lab Services Optometrists Private Duty Nurses Psychiatrists, Psychologists Rehabilitation Centers Therapists Hospitalization All payments to Medical Service Corporations 	

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GROSS PROCEEDS PAID TO AN ATTORNEY (Form 1099-MISC, Box 14)	
Gross proceeds paid to an attorney in connection with legal services.	Professional Service Payments Protection Services Security Services Teacher/Instructor (Non-Employee) Trash Removal Working Interest - Oil and Gas Payments
FORM 1099-INT, 1099-DIV, 1099-G and 1099-S EXAMPLES OF REPORTABLE PAYMENTS	
INTEREST (Form 1099-INT, Box 1)	DIVIDENDS (Form 1099-DIV, Box 1)
Interest income	Distributions, such as dividends, capital gain distributions, or nontaxable distributions, that were paid on stock, and liquidation distributions.
TAXABLE GRANTS (Form 1099-G, Box 6)	PROCEEDS FROM REAL ESTATE (Form 1099-S, Box 2)
Taxable Grants	Gross Proceeds from the sale or exchange of real estate

SMART 1099 Account Code Guide

Note: Titles are presented as they appear in SMART (field length limits)

SMART Account	STARS Esubj	Title	1099 TYPE	1099 Class	Notes
523100	2310	REPROGRAPHIC EQUIPMENT RENTAL	1099	01	
523200	2320	BUILDING SPACE RENTAL	1099	01	
523300	2330	EQUIPMENT RENTAL	1099	01	
523400	2340	LAND RENTAL	1099	01	
523600	2360	INFORMATION PROCESSING EQUIPMENT RENTAL	1099	01	
523700	2370	INFORMATION PROCESSING SOFTWARE RENTAL	1099	01	
523900	2390	OTHER RENTALS	1099	01	
524101	2410	REPAIR AND SERVICE - PASSENGER CARS	1099	07	
524201	2420	REPAIR AND SERVICE - OTHER SELF-PROPELLED EQUIP	1099	07	
524300	2430	REPAIR AND SERVICE - MACHINERY,EQUIPMENT,FURNIT	1099	07	
524400	2440	REPAIR AND SERVICE - BUILDINGS AND GROUNDS	1099	07	
524501	2450	REPAIR AND SERVICE-HIGHWAYS AND BRIDGES (276, 7	1099	07	
524700	2470	INFORMATION PROCESSING EQUIPMENT REPAIR & SERVI	1099	07	

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524800	2480	INFORMATION PROCESSING EQPT SOFTWARE MAINT & SE	1099	07	
524900	2490	REPAIR AND SERVICE - NOT OTHERWISE CLASSED	1099	07	
525120	2521	HIRE OF CARS, PLANES, BUSES FOR IN- STATE TRAVEL	1099	01	Taxable if paid direct to vendor
525130	2531	STATE CAR EXPENSE FOR IN-STATE TRAVEL	see note		Repairs are taxable if paid direct to vendor, supplies are not
525170	2571	RAIL, PLANE, BUS FARES - IN-STATE TRAVEL	1099	07	Taxable if paid direct to vendor
525180	2581	LODGING	1099	01	Taxable if paid direct to vendor
525190	2591	NONSUBSISTENCE ITEMS FOR IN- STATE TRAVEL	see note		Taxable if paid direct to vendor; conference registration 1099 class 03
525220	2522	HIRE OF CARS, PLANES, BUSES - OUT- OF-STATE TRAVEL	1099	01	Taxable if paid direct to vendor
525230	2532	STATE CAR EXPENSE FOR OUT-OF- STATE TRAVEL	see note		Repairs are taxable if paid direct to vendor, supplies are not
525270	2572	RAIL, PLANE, BUS FARES - OUT-OF- STATE TRAVEL	1099	07	Taxable if paid direct to vendor
525280	2582	LODGING	1099	01	Taxable if paid direct to vendor
525290	2592	NONSUBSISTENCE ITEMS FOR OUT-OF- STATE TRAVEL	see note		Taxable if paid direct to vendor; conference registration 1099 class 03
525320	2523	HIRE OF CARS, PLANES, BUSES - INTERNATIONAL TRAVEL	1099	01	Taxable if paid direct to vendor
525330	2533	STATE CAR EXPENSE FOR INTERNATIONAL TRAVEL	see note		Taxable if paid direct to vendor
525370	2573	RAIL, PLANE, BUS FARES - INTERNATIONAL TRAVEL	1099	07	Repairs are taxable if paid direct to vendor, supplies are not
525380	2583	LODGING	1099	01	Taxable if paid direct to vendor
525390	2593	NONSUBSISTENCE ITEMS FOR INTERNATIONAL TRAVEL	varies		Taxable if paid direct to vendor
526200	2620	HONORARIUMS	1099	07	in some cases could be class 03
526320	2632	COMPUTER PROG AND DATA PROCESS-VENDORS O/T DISC	1099	07	
526330	2633	DATABASE ACCESS FEES-VENDORS OTHER THAN DISC	1099	07	
526400	2640	RECORDING FEES, SERVICING, AND COURT COSTS	1099	07	
526500	2650	LABORATORY FEES	1099	07	

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526700	2670	BOARDING HOME PAYMENTS	1099	01	
526800	2680	MAINTENANCE AND TUITION FOR REHABILITATION CLIE	1099	07	
526900	2690	OTHER FEES	1099	07	
526910	2691	CREDIT CARD FEES AND CHARGES	1099	07	
526920	2692	BANK FEES CHARGED BY CONTRACTOR BANKS-REIM TREAS.	1099	07	
526960	2696	E-CHECKS FEES AND CHARGES	1099	07	
526970	2697	MILITARY ACTIVATION PAYMENT	1099	03	
527100	2710	ARCHITECTS AND ENGINEERS	1099	07	
527200	2720	ATTORNEYS AND LAWYERS	1099	07	
527300	2730	PHYSICIANS AND MEDICAL ASSOCIATIONS	1099	06	
527400	2740	HOSPITALS AND NURSING HOMES	1099	06	
527500	2750	ADVERTISING AGENCIES	1099	07	
527600	2760	VETERINARIANS	1099	07	
527700	2770	LECTURERS, SPEAKERS AND ENTERTAINERS	1099	07	
527800	2780	ACCOUNTANTS AND AUDITORS	1099	07	
527910	2791	INFORMATION SYSTEMS CONSULTING FEES	1099	07	
527990	2700	ADMINISTRATIVE SERVICES	1099	07	
527990	2790	professional services	1099	07	
529200	2920	LAUNDRY, DRY CLEANING AND TOWEL SERVICE	1099	07	
529500	2950	NON-EMPL REWARDS,PREMIUMS & BOUNTIES-IRS REPORT	1099	03	
529500	2950	NON-EMPL REWARDS,PREMIUMS & BOUNTIES-IRS REPORTABL	1099	03	
529500	2954	NON-EMPL AWARDS,REWARDS,PREMIUMS &BOUNTIES-NOT IRS			
542010	4200	BUILDINGS AND IMPROVEMENTS	1099	07	
542090	4209	BUILDINGS AND IMPROVEMENTS- NON-INVENTORY	1099	07	

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543100	4310	LAND AND INTEREST IN LAND	1099S	01	Reportable if Agency is Closing Agent
543190	4319	LAND AND INTEREST IN LAND - NON-INVENTORY	1099S	01	Reportable if Agency is Closing Agent
544010	4450	BLDGS & GRNDS- LAND IMPROVE (CAPITAL/INV) IRS	1099	07	
544090	4459	BLDGS & GRNDS- LAND IMPROVE (CAPITAL/NONINV) IR	1099	07	
552040	5204	INTEREST INCOME ON UNCLAIMED PROPERTY (670 ONLY)	1099I	01	
552050	5205	DIVIDEND INCOME ON UNCLAIMED PROPERTY (670 ONLY)	1099D	01	
552060	5206	ROYALTY INCOME ON UNCLAIMED PROPERTY (670 ONLY)	1099	02	
552400	5240	WORKERS' COMPENSATION CLAIMS(AGENCY 173 & 331 ONLY)			Not reportable
552400	5241	GROSS PROCEEDS PAYMENTS TO ATTORNEYS FOR WORKERS	1099	14	Reportable
552700	5270	CIVIL RIGHTS CONCILIATION CLAIMS	1099	03	
552700	5271	GROSS PROCEEDS PAYMENTS TO ATTORNEYS FOR CIVIL	1099	14	
552800	5280	PROMPT PAYMENT ACT INTEREST PENALTIES	1099I	01	
552900	5290	OTHER CLAIMS			
552900	5291	GROSS PROCEEDS PAYMENTS TO ATTORNEYS FOR OTHER	1099	14	
552900	5292	OTHER CLAIMS - NON WAGE PAYMENTS	1099	03	
555100	5510	DIRECT STATE WELFARE ASSISTANCE (AGY 039,629 ON	1099	07	
555100	5514	STATE WELFARE ASSISTANCE-NOT SETOFF,NOT IRS REPORT		none	
555110	5511	DIRECT STATE WELFARE ASSISTANCE-SETOFF,NOT IRS REP		none	
555110	5512	STATE WELF ASST-SETOFF,IRS REP(171 & 629 ONLY)	1099	07	
555150	5515	STATE WELF ASST-RENT,SETOFF,IRS REP(171 & 629 O	1099	01	
555160	5516	STATE WELF ASST-MED&HLTH PAY IRS REP(039,171,35	1099	06	
555200	5520	DIRECT FED WELFARE ASST-AGY 039,171,629 ONLY	1099	07	
555200	5524	FEDERAL WELFARE ASSISTANCE-NOT SETOFF,NOT IRS REPO			
555210	5521	FEDERAL WELFARE ASSISTANCE-SETOFF,NOT IRS REP			

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555210	5522	FED WELFARE ASST-SETOFF,IRS REP(171, & 629 ONLY	1099	07	
555250	5525	FED WELFARE ASST-RENT,SETOFF,IRS REP(171, 629 O	1099	01	
555260	5526	FED WELF ASST-MED&HLTH PAY SETOFF IRS REP(039,1	1099	06	
555850	5585	HOUSING ASSISTNCE PAYMNTS-DEBT SETOFF IRS REPOR	1099	01	
555900	5590	OTHER STATE SPECIAL GRANTS (206,300,350,629,683)			
555900	5590	OTHER SPECIAL GRANTS-IRS REPORTABLE	1099G	05	
555900	5591	OTHER SPECIAL GRANTS-IRS REPORTABLE	1099G	06	
555900	5596	OTHER SPECIAL GRANTS-IRS REP MED & HLTH PAYMENTS	1099G	06	
559200	5920	ROYALTY PAYMENTS	1099	02	
559400	5940	KANSAS BREEDING DEVELOPMENT SUPPLEMENTS(553 ONL	1099	03	
559500	5950	INT INCOME:APPL DEP REF(553),BUS TAX REF(565) O	1099I	01	
559800	5980	AGRICULTURAL CONSERVATION PROG PMTS(634 ONLY)	1099G	06	

Page name	Navigation
Withholding Vendor Information	Vendors > Vendor Information > Add/Update (Find An Existing Value - Enter Search Criteria and Search) > Search Results > Select the desired result > Click the Location Tab > Click the 1099 Link > Withholding Vendor Information page

The screenshot displays the SAP Vendor Location configuration page for Vendor SOKID. The page is divided into several tabs: Summary, Identifying Information, Address, Contacts, Location, and Custom. The Location tab is active, showing details for a vendor location with ID 001. The location is marked as 'Default' and has a description of 'SYSTEM CHECK'. The 'Details' section shows an effective date of 01/01/2010 and a status of 'Active'. Under the 'Options' section, there are links for 'Payables', 'Procurement', 'Sales/Use Tax', and '1099'. The '1099' link is highlighted with a black box. Below the options are expandable sections for 'Additional ID Numbers', 'Comments', 'Internet Address', and 'VAT'. At the bottom of the page, there are buttons for 'Save', 'Return to Search', 'Notify', 'Add', and 'Update/Display'. A navigation bar at the bottom of the page contains links for 'Summary', 'Identifying Information', 'Address', 'Contacts', 'Location', and 'Custom'.

Figure 3.24. Vendor Location Tab – 1099 Link

Click the **1099** link on the vendor **Location** page to open the **Withholding Vendor Information** page.

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Withholding Vendor Information

SetID: SOKID Location: 001
Vendor ID: 0000046349 Description: SYSTEM CHECK
Short Vendor Name:
Name 1: KANSAS MASONIC HOME

1099 Options

1099 Information Customize | Find | View All | First 1 of 1 Last

*Entity	*Type	*Jurisdiction	Default Jurisdiction	*Default Class	*1099 Status		
IRS	1099	FED	<input checked="" type="checkbox"/>	06	RPT	Reporting Only	+ -

1099 Reporting Information Customize | Find | View All | First 1 of 1 Last

*Entity	*Address	TIN Type	Taxpayer Identification Number	Gender	Date of Birth	Birth Location	Number of children	Company		
IRS	1	F	480543706					<input type="checkbox"/>	+ -	-

OK Cancel

Figure 3.25. Withholding Vendor Information page

Important! You must check the **Withholding** checkbox on the vendor **Identifying Information** tab if the vendor is subject to 1099 reporting.

* **Status:** Approved ▼

* **Persistence:** Regular ▼

VAT Registration Registration

Withholding

Figure 3.26. Vendor Identifying Information page – Withholding Checkbox

Important: You will receive a 'fatal error' message from SMART if....

You selected the Withholding checkbox on the Identifying Information tab, but you did NOT complete the information in the Withholding Vendor Information page, AND you try to Save the vendor record.

In this case, SMART will NOT allow you to save the vendor record; and you will have to enter ALL of the vendor information again!

1099 Types and Class Information

- Each vendor Location needs at least one 1099 set up
- The *Type and *Default Class will initially populate on a Voucher when it is created
- Each Location should only have one *Type
- When setting up the 1099 information for a vendor, set up all the *Default Classes you anticipate the vendor may use

Fields	Description
1099 Information Section Main Information Tab *Entity	Agencies: Select the 'IRS' option. Agencies: Do NOT use any other option.
1099 Information Section Main Information Tab *Type	Select the correct Type of withholding. For each withholding type, there may be classes and categories associated with the type. Values include: 1099, 1099D, 1099G, 1099I, and 1099S.
1099 Information Section Main Information Tab *Jurisdiction	Select the Withholding Jurisdiction for this type of withholding
1099 Information Section Main Information Tab Default Jurisdiction Checkbox	Indicate which jurisdiction is the default by selecting the check box in that jurisdiction's row. You can select more than one row as the default jurisdiction.

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Fields	Description
1099 Information Section Main Information Tab *Default Class	<p>Select one of the following withholding classes for the type of withholding:</p> <p><u>Reportable:</u></p> <ul style="list-style-type: none"> • 01 Rental • 02 Royalties • 03 Prizes, Awards, other • 06 Medical, including medical laboratory service • 07 Services including legal • 14 Gross Proceeds: <ul style="list-style-type: none"> - Payments made to an attorney as part of a legal settlement or court order. - Gross proceeds may be issued in the names of the attorney and the client. - Gross proceeds may include an amount for the attorney's services. -If you can determine the amount of attorney fees included in the gross proceeds, report the fee in box 7 and nothing in box 14. <p><i>Agencies – Do NOT select any of the other values from the list.</i></p> <p><u>Not Reportable:</u></p> <ul style="list-style-type: none"> • Examples: Commodities and refunds
1099 Information Section Main Information Tab *1099 Status	Select the withhold status for this withholding class combination and vendor location. Select the RPT – Reporting Only option.
1099 Information Section Main Information Tab + button	Click the + button to add a NEW *Type for the vendor
1099 Information Section Main Information Tab ‘-’ button	<p><i>Agencies – Do NOT use the – button. This button is for use by the Central Vendor Processor only.</i></p> <p><i>Submit a TM-21 Form to the Central Vendor Processor to have vendor information removed.</i></p>
1099 Information Section Overrides Tab	<i>Agencies – Do NOT use the Overrides Tab. The State of Kansas is not using this functionality.</i>

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Fields	Description
1099 Information Section Remit Tab	Agencies – Do NOT use the Remit Tab. The State of Kansas is not using this functionality.
1099 Reporting Information Main Information *Entity	Agencies: Select the 'IRS' option. Agencies: Do NOT use any other option.
1099 Reporting Information Main Information *Address	Select the vendor's address from the addresses defined on the Vendor Information - Address page. The entity needs the vendor's address. Note: The Address field defaults the value of "1". Change the Address code if this is not correct.
1099 Reporting Information Main Information TIN Type	Select the Taxpayer Identification Number (TIN) type for the vendor from these options: F = Federal Employer ID Number S = Social Security Number
1099 Reporting Information Main Information Taxpayer Identification Number	Enter the vendor's valid 9 digit TIN for the withholding entity. If you enter any number with less, or more than, 9 digits, you will receive an error message and you will not be allowed to Save the vendor record. For Foreign vendors , enter the word ' FOREIGN ' in the TIN field. Foreign vendors are entered manually ONLINE in SMART only, they cannot be uploaded using an interface. Any ACH payments to FOREIGN banks are entered ONLINE only. If a foreign vendor does not have a TIN #/W-9 Form, please obtain a W-8 form to send to the Central Vendor Processor. For Federal vendors , enter ' FED ' in the TIN field For all other types of vendors that do not meet one of the above TIN types criteria, enter ' OTH '. Note: For security purposes, SMART encrypts the entire TIN number with "*"s" when the TIN field contains 9 numeric characters. SMART does not allow you to Save the vendor record if you attempt to enter anything else in the TIN field.
1099 Reporting Information Main Information Gender	Agencies – Do NOT use the Gender field. The State of Kansas is not using this field.

Fields	Description
1099 Reporting Information Main Information Date of Birth	Agencies – Do NOT use the Date of Birth field. The State of Kansas is not using this field.
1099 Reporting Information Main Information Birth Location	Agencies – Do NOT use the Birth Location field. The State of Kansas is not using this field.
1099 Reporting Information Main Information Number of children	Agencies – Do NOT use the Number of Children field. The State of Kansas is not using this field.
1099 Reporting Information Main Information Company Checkbox	Agencies – Do NOT use the Company Checkbox. The State of Kansas is not using this checkbox.
1099 Reporting Information Main Information + button	Click the + button to ADD a new line of information.
1099 Reporting Information Main Information ‘-’ button	Agencies – Do NOT use the – button. This button is for use by the Central Vendor Processor only. Submit a TM-21 Form to the Central Vendor Processor to have vendor information removed.
1099 Reporting Information Additional Information Tab	Agencies – Do NOT use the Additional Information tab. The State of Kansas is not using this tab.
OK button	Once you have added the information on the Withholding Vendor Information page, click the OK button to save your changes
Cancel button	If you do NOT want to save the information you added to the Withholding Vendor Information page, click the Cancel button to cancel the changes you made.

Adding a New Location:

- You can search for an existing vendor by Vendor ID, Name, or Withholding Tax ID
- Click the “**SEARCH**” button

Figure 3.27. Review Vendor page

- The vendor record, Summary page is displayed. Select the **Location Tab**.

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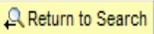
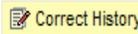
Summary	Identifying Information	Address	Contacts	Location	Custom
SetID:	SOKID				
Vendor ID:	0000046349				
Vendor Short Name:	KANSAS MAS		KANSASMAS-001		
Vendor Name:	KANSAS MASONIC HOME				
Order:	KANSASMAS-001		Remit To:	KANSASMAS-001	
	401 S SENECA ST			401 S SENECA ST	
	WICHITA, KS 67213-5541			WICHITA, KS 67213-5541	
Status:	Approved		Last Modified By:	FIRSTLOGIC	
Persistence:	Regular		Last modified date:	02/26/2011 9:46AM	
Classification:	Supplier		Created By:	CNV	
HCM Class:			Created Date/time:	06/07/2010 12:00AM	
Open for Ordering:	Yes		Last Activity Date:	02/15/2011	
Withholding:	Yes				
VAT:	No				
 Save			 Add		
 Return to Search			 Update/Display		
 Notify			 Include History		
			 Correct History		
Summary Identifying Information Address Contacts Location Custom					

Figure 3.28. Vendor Page – Location Tab (Outlined)

- The Vendor **Location** page is displayed. **Location 1** is displayed. Be sure to review all existing location records PRIOR to adding a NEW location !
- To **ADD a new location**, click on the “+” button.
 - o If all addresses associated with the vendor require payments as “SYSTEM CHECK” (paper check), you do NOT need to add a new location.
 - o If a vendor wants an ACH payment (direct bank account payment), and the existing record is only a “SYSTEM CHECK”, a new location needs to be set up.

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Summary Identifying Information Address Contacts **Location** Custom

SetID: SOKID
Vendor: 0000046349 Short Vendor Name: KANSASMAS-001 Name: KANSAS MASONIC HOME

A vendor location is a default set of rules which define how you conduct business with a vendor.

Location Find | View All First 1 of 2 Last
*Location: 001 Default + -
Description: System Check [RTV Fees](#)

Details Find | View All First 1 of 1 Last
*Effective Date: 01/01/1901 + -
Status: Active
Options: [Payables](#) [Procurement](#) [Sales/Use Tax](#) [1099](#) Expand All Collapse All
▶ Additional ID Numbers
▶ Comments
▶ Internet Address
▶ VAT
Expand All Collapse All

Figure 3.29. Location Page (Detail) – Add a New Location Button (Outlined)

- ***Location:** Enter desired location number. For example: '002'
- **Description:** Enter 'ACH ****XXXX' (where XXXX is the last 4 digits of the bank account number)
- **Effective Date:** <today's date> (SMART default value)
- Click on the **Payables** Link

Summary | Identifying Information | Address | Contacts | **Location** | Custom

SetID: SOKID

Vendor: 0000046349 Short Vendor Name: KANSASMAS-001 Name: KANSAS MASONIC HOME

A vendor location is a default set of rules which define how you conduct business with a vendor.

Location Find | View All First 2 of 2 Last

*Location: 002 Default

Description: ACH ****2251 [RTV Fees](#)

Details Find | View All First 1 of 2 Last

*Effective Date: 01/01/1901

Status: Active

Options: **Payables** [Procurement](#) [Sales/Use Tax](#) [1099](#) [Expand All](#) [Collapse All](#)

▶ Additional ID Numbers

▶ Comments

▶ Internet Address

▶ VAT

[Expand All](#) [Collapse All](#)

Figure 3.30. Location Page (Detail) – Add a new vendor location (data entry required)

- On the **Payables Option page**, click the **Expand Section button** (triangle button to the left of the title) for the **Additional Payables Options** section.

Additional Payables Options	
Payment Control Pay Group: <input type="text"/> *Delay Days: Default <input type="text"/> Discount: <input type="text"/> Net: <input type="text"/> <input type="checkbox"/> Hold Payment <input type="checkbox"/> Complex Routing <input type="checkbox"/> Always take discount <input type="checkbox"/> Separate Payment <input type="checkbox"/> Factoring <input type="checkbox"/> Apply Netting	Bank *Bank Options: Default <input type="text"/> Bank: <input type="text"/> Account: <input type="text"/> Currency: USD <input type="text"/> Dollar Rate Type: CRRNT Current
Draft Processing Control *Draft Sight: Default <input type="text"/> <input type="text"/> *Draft Rounding: Use Pay Cycle Default <input type="text"/> Rounding Position: <input type="text"/> *Remaining Amount Action: Do not issue Draft <input type="text"/> *Payment Method: CHK <input type="text"/> Check *Draft Optimize: Use Pay Cycle Default <input type="text"/>	Additional Payment Information *Payment Method: Specify <input type="text"/> Automated Clearing House <input type="text"/> *Layout Option: Specify <input type="text"/> Layout: KAPCTX <input type="text"/> *Handling Options: Default <input type="text"/> Handling: <input type="text"/> Reschedule ID: <input type="text"/>

Figure 3.32. Additional Payables Option - Additional Payment Information Section (Outlined)

- Click on the **Expand Section button** (triangle button to the left of the title) for the **Vendor Bank Account Options** section.

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<p>Draft Processing Control</p> <p>*Draft Sight: <input type="text" value="Default"/> <input type="text"/></p> <p>*Draft Rounding: <input type="text" value="Use Pay Cycle Default"/></p> <p>Rounding Position: <input type="text"/></p> <p>*Remaining Amount Action: <input type="text" value="Do not issue Draft"/></p> <p>*Payment Method: <input type="text" value="CHK"/> <input type="text" value="Check"/></p> <p>*Draft Optimize: <input type="text" value="Use Pay Cycle Default"/></p> <p>Max Number of Drafts: <input type="text"/></p>	<p>Additional Payment Information</p> <p>*Payment Method: <input type="text" value="Specify"/> <input type="text" value="Automated Clearing House"/></p> <p>*Layout Option: <input type="text" value="Specify"/></p> <p>Layout: <input type="text" value="KAPCTX"/></p> <p>*Handling Options: <input type="text" value="Default"/></p> <p>Handling: <input type="text"/></p> <p>Reschedule ID: <input type="text"/></p>
<p>Holiday Processing Options</p> <p>*Holiday Processing: <input type="text" value="Default"/></p> <p>Holiday Options: <input type="text"/></p> <p>Days: <input type="text"/> <input type="checkbox"/> Allow due date in next month</p>	<p>Document Sequencing Type</p> <p>*Doc Type: <input type="text" value="Default"/> <input type="text"/></p>
<p>▶ Matching/Approval Options</p> <p>▶ Electronic File Options</p> <p>▶ Self-Billed Invoice Options</p> <p>▶ Vendor Bank Account Options</p> <p>▶ Vendor Type Options</p> <p>▶ HIPAA Information</p> <p>▶ Debit Memo Options</p>	

Figure 3.33. Payables Options page – Vendor Bank Account Options section (Outlined)

- Enter the **Vendor Bank Account** information from the DA-130 and the voided check (if obtained for an individual)

Vendor Bank Accounts Find | View All First 1 of 1 Last

Default Descr:

Country:

Bank Name:

Branch Name:

Bank ID Qualifier: Account Type:

Bank Identifier Code:

Bank ID:

Bank Account Number:

DFI Qualifier: DFI ID:

IBAN:

▶ Vendor Type Options

▶ HIPAA Information

▶ Debit Memo Options

Figure 3.34. Vendor Bank Accounts Section and OK button (Outlined)

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- Click the **OK** button.
- Next, you need to complete the 1099 information. Click on the **1099** link.

The screenshot displays the SAP Vendor Location page. At the top, there are tabs for Summary, Identifying Information, Address, Contacts, Location, and Custom. The Location tab is active. Below the tabs, the SetID is SOKID. The Vendor information includes Vendor: 0000046349, Short Vendor Name: KANSASMAS-001, and Name: KANSAS MASONIC HOME. A note states: "A vendor location is a default set of rules which define how you conduct business with a vendor." The Location section shows *Location: 002, Description: ACH ****2251, and a link for RTV Fees. The Details section shows *Effective Date: 01/01/1901, Status: Active, and Options: Payables, Procurement, Sales/Use Tax, and 1099 (highlighted with a black box). There are Expand All and Collapse All buttons for both the Location and Details sections.

Figure 3.35. Vendor Location Page – 1099 Link (Outlined)

- Refer to Topic 9 for completing 1099 information for a vendor.
- Save the vendor record before exiting the record
- Don't forget to send the additional information Forms to the Central Vendor Processor via email !

Topic 10: Vendor Conversation Page

- You can view internal conversation information for a vendor that has previously been entered into SMART.

Note: Agency Vendor Processors can add conversations to vendor records. This is an optional use page for Agencies.

Page name	Navigation
Vendor Conversation	Vendors > Vendor Information > Maintain > Conversations

Figure 3.36. Vendor Conversation Page

Fields	Description
*Date	The current date (today's date) automatically defaults in the *Date field. Agencies: Do NOT change the default conversation date. Accept the default value of <today's> date.
User ID	SMART automatically populates the User's ID in the User ID field. This indicates which SMART user created the conversation note in SMART.
Contact	Enter the vendor Contact in the Contact field if applicable. If desired, click the Lookup button to locate a vendor Contact.
Conversation Sequence Number	SMART automatically adds the Conversation Sequence Number. Values begin at "1" and are added incrementally. Example: 1, 2, 3, and so on.

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Fields	Description
Topic	Maximum field length: 30 characters. Use the free text Topic field to enter a title for the topic of conversation.
Descr	Free text field. Use the Descr field to enter a brief summary of the conversation.
Keywords Section	Optional. You may assign up to three (s) keywords from the available list of keywords to each conversation note if desired. Keyword options include: 1099, address, available, back order, bulk, buy out, conceal, confirm, contact, damage, dispute, duplicate, eft, estimate, freight, invoice, irate, late pay, late ship, lead time, lost pymt, name chg, order ad, other, overship, partial, price, product, quote, refund, remit add, restocking, ret/exch, returns, sales tax, satisfact, service, setoff, ship add, ship owner, shipment, short ship, shortage, stock fee, substitute, tax, tax exempt, terms, W9, warranty, and wrong.
Review Section Review Date	Optional use field. Use the Review Date field to enter a review date in SMART. Please note that there is NO functionality associated with this feature in SMART.
Review Section Review Days	Optional use field. Use the Review Days field to enter a number of review days in SMART. Please note that there is NO functionality associated with this feature in SMART.
Review Section Next Review Date	Optional use field. Use the Next Review Date field to enter a next review date in SMART. Please note that there is NO functionality associated with this feature in SMART.
Save button	Use the Save button to save the conversation notes that you have entered. If you do NOT use the Save button, any notes you enter will NOT be saved.
Return to Search button	Use the Return to Search button to return to the search results screen (the search screen prior to this screen).
Notify button	<i>The State of Kansas is not using the Notify functionality in this section of SMART. Agencies: Do NOT use this Notify button.</i>
Refresh button	Once you have entered and saved conversation notes, you may use the Refresh button to refresh the display of the Vendor Conversation page.

Topic 11: Vendor Contact Page

- Use the Vendor Contact page to view Vendor Contact information.
Note: This is an optional use page for Agencies. Agency Vendor Processors are unable to change any information on the Vendor Contact Page – this is a VIEW ONLY page.
- The information on the Vendor Contact page is sourced from the Contact tab in the Vendor record.

Page name	Navigation
Vendor Contact	Vendors > Vendor Information > Review Vendors > Enter search criteria > Click Search button > Search Results grid > Click the  icon in the Vendor ID column > Click the Vendor Contact link > Opens a new window with the Vendor Contact page

Vendor Contact

SetID: SOKID

Vendor: 0000046349 Short Vendor Name: KANSASMAS-001 Name: KANSAS MASONIC HOME

Vendor Contact Find | View All First 1 of 1 Last

Contact ID: 1

Description:

Details Find | View All First 1 of 1 Last

Eff Date: 08/23/2011

Status: Active

Type:

Name:

Title:

Address:

URL: <http://> [View Internet Address](#)

Email ID:

Phone Information Customize | Find | View All First 1 of 1 Last

Type	Prefix	Telephone	Extension

Save
Return to Search
Notify

Figure 3.37 Vendor Contact Page

Lesson Review

In this lesson, you learned how to:

- Define the key terms and concepts used in the entry of vendor information in SMART
- Navigate to and use the vendor pages in SMART to enter vendor information
- Describe the concept and criteria associated with Withholding payments for vendors
- Explain the State of Kansas business processes associated with entering new vendor information
- Locate, complete, and submit the necessary forms and emails associated with vendor changes and updates